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ABSTRACT

One in a series of reports on public service studies by academic libraries that are being administered by the Office of Management Studies (OMS) of the Association of Research Libraries (ARL), this report on the self-study of the University of California, Riverside (UCR) Libraries includes a brief description of the overall project and an executive summary of the UCR study, both prepared by OMS. The summary indicates the themes identified throughout the 75 recommendations, including commitment to coordinated public services training and the necessity for organizing and planning for technological change, and lists the major issues studied by the five task forces--the role of the library in the future in its commitment to public services; service performance and service needs; technology and public services; organization, staffing, and management of public services; and articulating the library's public services program. The report of the UCR study team includes a list of participants; the charge to the team; a summary of the study; a brief introductory statement; the recommendations made by the team in seven areas--organization and administration, policy, communications, staff and staffing, services, facilities, and ancillary; and two tables. Listed in the table of contents as Appendix 1 and 2 but not included in this volume, are the products of phase one and the task force reports, which are available separately from OMS. Appended to the document are brief explanatory notes on this publication series along with two summaries. (DMC)

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PUBLIC SERVICES IN RESEARCH LIBRARIES:

A SELF-STUDY

conducted by

THE UNIVERSITY LIBRARIES
UNIVERSITY OF CALIFORNIA, RIVERSIDE

FINAL REPORT OF THE STUDY TEAM

March, 1984

IR050770

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Organization, Staffing, and Management
Articulating the Library's Public Services Program

"...Many shall run to and fro, and knowledge shall increase."
--Daniel 12:4

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Nancy Huling (Chair)
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Many individuals contributed to the successful completion of the Public Services Self-Study. The Study Team pays a special tribute to the members of the Task Forces, who worked long hours to keep up with their workloads while participating in the Study. We also thank all Library Staff, who assumed extra duties in order to allow their colleagues to actively engage in the Study. Several department secretaries/administrative assistants provided their valuable services: Rose Elugardo, Debbie Harrington, Pat Hunt, Mike Jenkins, Elizabeth Khan, Geri Nezart.

The Study Team thanks Joan Chambers, University Librarian, for her moral and financial support during the period of the Study, and for some worthy suggestions put forth during our regular meetings with her. The Library also provided ongoing financial support.

Patricia Swanson, Office of Management Studies Consultant, provided wise and sensitive guidance as we moved through the study. Her objective outlook was particularly valuable. Peter Haikalis, OMS Consultant Trainee, was her skillful assistant. Both receive our grateful thanks.

RIVERSIDE: OFFICE OF THE LIBRARIAN
RIVERSIDE, CALIFORNIA 92507

March 15, 1983

TO: Public Services Study Team

FROM: Joan Chambers Joan Chambers
University Librarian

RE: Charge to the Study Team

Thank you for accepting this important assignment. This study has the potential of significantly influencing the future provision of public services in the UCR Library. In accepting this assignment, you share with me a commitment to the successful completion of the study through the self-study process, to assisting in the revision and improvement of the Study Manual provided by OMS, and to sharing our results and experiences with other libraries. In return you have my commitment to address the recommendations which result from your study and to support their implementation in the Library. This represents a mutually earnest commitment with important consequences for the Library.

The study will officially begin on April 5 and should be completed by October 31, with the final report submitted to me before November 23, 1983.

Although I have described our current services as exemplary, this study will provide us with the following opportunities:

1. To assure that our services continue to change in response to a rapidly changing environment which includes:

   a) increased information resources not matched by increased funds or staff for the Library,

   b) technological developments which can enhance access to the ever-expanding information resources,

   c) changes in the expectations and needs of faculty and students which may most effectively be identified and addressed by a personal liaison relationship between the Library and academic departments, and

   d) a re-defined role for the Library in support of the research and education mission of the university.

2. To establish with our faculty and students a consensus on priorities for public services.

I expect the Study Team to consult broadly as you seek information and opinion, to use all relevant Library files and reports, and to read pertinent literature. Your first order of business will be to assure an appropriate level of communication both with me and with the Library staff. This should include brief progress reports in each issue of the Library Newsletter; periodic meetings with me, especially when draft or preliminary reports are available; and general staff meetings during each of the consultant visits.

UNIVERSITY OF CALIFORNIA — (Letterhead for interdepartmental use)

The following excerpt from the preliminary edition of the Public Services Assisted Self-Study Manual defines the scope of the study:

"Public services are defined in this study as any service where the user is expected to have direct contact with library staff or library resources. The direct contact may be in-person, by telephone, by electronic medium or by mail. Even though occasionally a library user may go into the Acquisitions Department or speak with the staff in the Catalog Department, for the purposes of this study these processing departments are not considered public services.

However processing departments' goals and performance have an impact on public services' effectiveness and must be taken into account in some way during the study. The relationship of collection development to public services must also be considered by participants in the study.

To allocate resources effectively, a library must define its role in the instructional and research programs of its parent institution, identify and monitor the needs of its users, offer, maintain, and evaluate a range of library services related to its goals, facilitate access to materials and services beyond the local institution, and set appropriate limits on its services.

More than other library functions, public services command high visibility, encompass diverse activities, contain multiple units, and respond to varied demands. Users and university officials are becoming more sophisticated in their expectations and they are scrutinizing library operations more and more intensely. Hence library staff members must be able to articulate the rationale for their programs and priorities and demonstrate their benefits to users. The staff also must be able to evaluate services offered and to define the degrees of success achieved.

Pressures on public service staffs have increased in recent years. As the need for traditional library services continue, demand for innovations such as database searching, library-use instruction and faculty seminars steadily mounts. The staff must know, not only about the library's own resources, but also about alternative sources for information, sometimes in non-traditional formats. The staff is expected to be knowledgeable in the disciplines as well as in professional matters, and adept in interpersonal and communications skills.

Deciding how to promote library services, idenfity new user groups, and define limits is difficult for any staff that is overextended to meet day-to-day demands. Yet attention to these matters is essential for continuing responsiveness to users, for seeking opportunities for new services, and, possibly, new sources of support. Effective management, coordination, and communication, often within complex organizational patterns, are additional important ingredients in the delivery and maintenance of effective public services."

Within the context of the above statement of scope, I would encourage you to examine, according to your best judgement, some or all of our services as well as the factors which influence them, such as:

Services	Factors
1) faculty liaison/collection development	1) assessment of user needs/expectations as indicated by users
2) instruction, orientation, computer-assisted instruction	2) measures of effectiveness and user satisfaction
3) interlibrary loan/document delivery	3) standards of performance/quality of service
4) computer-assisted reference	4) innovation/adaptation to change
5) media services and photocopying	5) technological developments such as MELVYL, OCLC, CLSI, INNOVAC 100, databases, etc.
6) services for special users (handicapped, non-UC)	6) priorities
	7) relations with administration, faculty, students
	8) organization, staffing, management
	9) training/staff development

Your final report should include (1) a brief historical perspective, (2) an assessment of the current situation and needs, (3) a projection of the future situation and needs, and (4) recommendations. The final report will be shared with Library staff, University officers and committees, the Office of Management Studies, and other libraries.

You have before you a challenging, exciting, and stimulating charge. I have every confidence that you will dismiss it with distinction. Please do not hesitate to let me know if I can assist you in any way.

/gn

cc: Patricia Swanson
Peter Haikalis
ULC

SUMMARY OF THE STUDY

It is with a sigh of relief mingled with anticipation that the Study Team submits to University Librarian Joan Chambers the final report of the Public Services Self-Study. One year ago, Ms. Chambers received the notification that the UCR Libraries had been selected as one of six pilot libraries to conduct an assisted self-study in the Public Services in Research Libraries project, supported by the General Electric Foundation and operated by the Association of Research Libraries' Office of Management Studies.

Work on the Study commenced at UCR in April, 1983, with the visit of the two consultants, Patricia Swanson from the Office of Management Studies Office and Peter Haikalis, the process consultant from California State University, San Francisco. The first two months involved the compilation of the background documents found in Appendix One. In late June, the Study Team identified the major issues to be addressed through the Study and appointed five task forces to gather and analyze data related to these issues.

The task force phase of the Study represented considerable effort on the part of thirty-five library staff (see participants list). The task forces appointed, with a brief description of their charges, were:

The Role of the Library in the Future in its Commitment to Public Services. Addressed questions of quality-quantity, self-service vs. full-service, the role of the library as a broker of information vs. knowledge institution, and the importance of a national public information policy.

Service Performance and Service Needs. Through the administration of user surveys (faculty, graduate students, undergraduate students, and external users), studied the current service performance of the Library and determined future needs.

Technology and Public Services. Explored the more specific and concrete aspects of the application of technology to public services. Included an inventory of technology presently in use in public services and recommended mechanisms for future planning and coordination of technology in the Library.

Organization, Staffing, and Management of Public Services. Examined organizational structure and reporting mechanisms in public services. Studied staff perceptions of their roles and priorities for service, determined in part through the administration of two staff surveys.

Articulating the Library's Public Services Program. Studied the public image of the Library as presented through its staff, its publications, its facilities, and its formal programs. Some focus on marketing techniques for future improvement and definition of the image.

The ability of all task forces to fully utilize the data gathered from the user surveys and from the several staff surveys was seriously hampered by the timing of the Study itself. The task forces were appointed and began work just as the academic year ended. Surveys had to be postponed until the beginning of the Fall Quarter in October.

The first task force report was received in early December and the last in early January. From late January until early March, the Study Team worked to synthesize and formulate the final recommendations. Areas of overlap surfaced in the draft recommendations received by the Study Team. These included the expression of a need for policy articulation, a commitment to a coordinated approach to public services training, the creation of a public services resource manual to support training, the formation of a public services committee to include a broad representation of public services staff, the need to improve communication with library staff and users, and the necessity of better organizing to plan for technological change.

Many of the recommendations have been recast to incorporate similar ideas appearing in more than one task force report. The Study Team recognizes that not every recommendation will receive unanimous acclaim or acceptance. We believe, however, that staff will not reject the entire report based on dissatisfaction with one or more recommendations. The Library Staff should keep in mind that the report is submitted to the University Librarian for her consideration. As noted in Ms. Chambers' Charge to the Study Team, we have her "commitment to address the recommendations which result from your study and to support their implementation in the Library." It is expected that some of the recommendations will need further discussion, clarification, and possible revision before implementation occurs.

Recommendations are organized into broad categories, but are not listed in priority order within these sections. The Study Team has indicated with an asterisk those recommendations that we hold to be particularly seminal.

The number and content of issues presented in the recommendations gives an idea of the enormity and complexity of our charge. Because of the naturally dependent relationship of public services and technical services, many of our recommendations stray beyond a pure public service approach. We believe that the Library as a whole, its users, and the campus will benefit from the work of the Study.

The Study Team Report does not include all recommendations presented by the Task Forces. Some of the recommendations are valuable concerns that need to be kept in mind, but require no specific action. Other recommendations reflect some misconceptions which the Study Team has tried to correct through clarification. An example of this is the organization and structure of reporting relationships for the collections. Finally, other recommendations, such as the establishment of a permanent information desk, were viewed as unfeasible in relation to the current budget structure, the size of the campus, and other service priorities. The recommendations selected and enlarged by the Study Team represent those we felt to be of high priority. Many worthy ideas appear in each of the Task Force Reports; these should be referred to by the Library as it plans for the future.

Dale Bailey

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Doris Weingart

INTRODUCTION

"I don't have a very good memory for my books -- I remember the experience of writing them more than what's in them." (author Larry McMurtry, speaking to a UCR English class on February 24, 1984).

Of equal importance to the end product of any OMS self-study is the process (or experience, as McMurtry says). The Office of Management Studies emphasizes through its programs the importance of utilizing a group process approach to library planning. The UCR Libraries began the Study with the assumption that there were no serious problems with public services. University Librarian Chambers described the services as "exemplary." This fact was happily supported by the results of the user surveys.

Why, then, undertake such an immense and time-consuming process? Ms. Chambers listed two reasons in her charge to the Study Team: 1) To assure that our services continue to change in response to a rapidly changing environment, and 2) to establish with our faculty and students a consensus on priorities for public services. This was an opportunity for the Libraries to review services for possible enhancements and, more importantly in light of a changing world, to establish a mechanism for future planning. Thus, while the recommendations and their underlying rationale may be forgotten, the experience of working through the process to reach those conclusions will be remembered through the establishment of a framework for future planning.

In early December, 1984, UCR received its first official visit from David Gardner, the new President of the University of California system. President Gardner directed an enthusiastic faculty and staff to devote all energies toward planning for the future growth he predicted. His outlook and belief in the UCR mission has infused the campus with new purpose.

So it is that the report of the Public Services Self-Study emphasizes the need for preparing for the future, with focus on the national arena and on enhancing current services to enable them to respond to a rapidly changing information environment. The Task Force on the Role of the Library in the Future identified three environmental trends and several other areas of broad concern which can serve as a framework for the current and future provision of services.

The first trend directly influencing the future of the university and its libraries is the growth of the information industry, an industry viewing information as a commodity analogous to any other product. The information industry is a potential competitor to both universities and libraries. The second trend is the proliferation of computer terminals in homes and offices through which information can be obtained from commercial sources. It is possible to by-pass the Library altogether. Finally, there is a gradual shift from print to electronic media. Eventually, electronic publishing will probably prevail, although print will not be replaced.

The library's role as an institution of knowledge or as a broker of information was another topic explored by the Futures Task Force. The conclusion reached determined that it is possible for a library to perform both roles. Knowledge subsumes information, but the converse is not true. A

knowledge institution can include an information brokering function. The Study Team recognizes and supports the need for the UCR Library to define its role, particularly since the role underlies general goals and objectives.

A final area of future concern is the need for librarians to play an active rather than a reactive role in the formation of a national information policy. The control of information and the right of the public to have equal access is far too important to be left in the hands of commercial enterprise.

Although the Study Team is assured through the study outcome that our current services satisfy our primary clientele, we cannot rest complacently. Assertive improvement of services is necessary when we consider how quickly the environment in which we operate is changing. In this symbolic year of 1984, the UCR Libraries must anticipate the future to assure that we act upon the environment as much as or more than it acts upon us. It is in this spirit that the Study Team presents its recommendations.

ORGANIZATION AND ADMINISTRATION RECOMMENDATIONS

The UCR Library is technologically rich, both in the systems it has in place to assist the user in identifying and locating needed information and in the knowledge held by members of the staff. Informal interviews conducted throughout the period of the Public Services Self-Study combined with intensive discussions in the Task Force on Technology and in the Study Team reveal a need for the Library to assume a more assertive role in defining, developing, and coordinating the use of technology. Without long-term planning in regard to the application of technology, the Library runs the risk of failing to utilize its systems to the fullest extent. At the same time, it is important that we do not let technology dictate the changes that we make; we must ensure that we have carefully examined all approaches to a stated problem before proceeding.

* RECOMMENDATION 1. Based on the report of the Task Force on Technology and Public Services and on deliberations in Study Team meetings, we recommend that the role of the Associate University Librarian be expanded and redefined to assume major responsibility for planning, guiding, and implementing current and future technological applications in the UCR Library. The AUL needs to be given formal responsibility and authority for performing this role. Because of the impact of technological innovation in the library world, this must be a priority of the position. We see the restructured position as having the following responsibilities:

1. To head the Computer Planning Committee (see recommendation concerning this committee below).

2. To develop, with the aid and consultation of the Computer Planning Committee, a long-range Library computerization plan in draft form for the UCR Library by 1 January 1985. Such a plan must clearly define and articulate the goals, objectives, and priorities of library computerization projects, and provide a sense of direction toward which the Library can proceed to make intelligent use of technological innovations. It must include a plan for the application of microcomputers in the Library, both for specific Library functions and for Library office application and management.

3. To monitor and keep abreast of technological developments and recommend Library applications in accordance with the long-range plan to enhance the Library's public services.

4. To reexamine the role and duties of the Systems Office within the Library to ensure that the office is providing effective services to the Library within the framework of rapidly changing technological developments in the library field. Current projects and procedures need to be reevaluated for their usefulness and to determine whether or not different means can be utilized to achieve the same end. In addition, the Study Team sees a need for the Senior Programmer to assist the AUL by keeping informed of advances in technology through reading the literature and attending appropriate conferences. The Systems Office needs to take a more active and advisory role in implementing new systems and equipment in the Library. The Office must assume some responsibility for learning new microcomputer

software, such as WordStar, and providing guidance to Library staff in the use of these systems.

5. To keep abreast of copyright laws as they relate to software and other forms of technology.

6. To serve as official liaison with appropriate campus departments, such as the Academic Computing Center, Academic Senate Computer Committee, and when relevant, the Academic Senate Library Committee on matters relating to technological planning and applications in the Library.

7. To perform with the University Librarian the role of informing campus administrators of the value, need, and costs of technological applications in the Library. Suggested avenues are: a. Conduct with the University Librarian "tours" of Library automation efforts for the Executive Vice-Chancellor and the Chancellor. The Study Team applauds the University Librarian's successful "tours" of this nature for the academic deans and urges a continuation of this practice. b. Publish articles in appropriate Library or campus newsletters for the campus community. c. Route Library Issues: Briefing for Faculty and Administrators to appropriate campus faculty and administrators.

8. To serve as a resource for technological applications in the Library, keeping abreast of the operational level of current computer applications and their compatibility with future systems.

9. To develop in consultation with the Computer Planning Committee and the Library Personnel and Budget Officer staff training programs related to existing and new technological applications in the Library.

10. To keep appropriate Library staff apprised of campus and systemwide technological applications that may have impact on their public service areas.

11. To develop policies and procedures as necessary for efficient, effective, and coordinated implementation and utilization of technology in the Library.

12. To keep up with the preservation problems of newer technologies and the regeneration of these materials.

(Source: Study Team; Role of the Library in the Future, pp. 13-15; Technology and Public Services, p.4: "As new information sources, methods of information processing and delivery develop through technological advances, libraries will be faced with the challenge of evaluating their usefulness and balancing them against ever-shrinking fiscal resources. Because these advances are rapidly accelerating, clear assignment of responsibility for the monitoring of technology and of its potential applications for the Library is critical.")

RESPONSIBILITY: University Librarian
IMPLEMENTATION: July, 1984

The coordination and planning for future technological applications in the Library cannot be performed by a single individual; the responsibility must be carried out with consultation and a sharing of the work when appropriate. Therefore:

RECOMMENDATION 2: The Study Team recommends that the Computer Planning Committee be reconstituted with a new membership composed of Division and appropriate department heads in order to efficiently recommend policy. Currently, public services representation on the Committee is insufficient to deal with future technological applications and their implications for the performance of public services functions. In addition, the charge to the Committee must be expanded to reflect advances in technology since 1979. The Committee will be responsible for working with the Associate University Librarian to assist in carrying out automation planning. We recommend that the Committee utilize the self-study approach by appointing appropriate and broadly representative Task Forces to examine specific issues and make recommendations to the Committee. The Committee will report to the Associate University Librarian. (Source: Study Team)

RESPONSIBILITY: Associate University Librarian
IMPLEMENTATION: July 1, 1984

The Study Team also identified specific areas to be addressed by the Computer Planning Committee:

Recommendation 2a: As the Library's collection of software grows, it is to be expected that the issue of circulation policy will arise. The Study Team recommends that the Computer Planning Committee develop a policy on the circulation of software. The committee must look into information policy as a whole to ensure that copyright guidelines are adhered to. It is understood that any policy concerning the circulation of software is subject to change based on changes in the law. (Source: Technology and Public Services, p. 12)

IMPLEMENTATION: October 1, 1984

Recommendation 2b: The survey of Library users determined that many users are interested in having direct access to circulation and on-order files through the availability of public terminals. The Study Team recommends that terminals supporting circulation and acquisitions functions be made available to users on an experimental basis. The Computer Planning Committee needs to examine the issues related to carrying this out. (Source: Service Performance and Service Needs, pp. 51-53)

IMPLEMENTATION: November 1, 1984 (present a report)

Recommendation 2c: The need for access to bibliographic information beyond MELVYL is substantial. It has not been possible for the public or the reference librarians to make full use of OCLC, since the Interlibrary Loan terminals are generally occupied and functions cannot be interrupted. The Study Team recommends that public access OCLC terminals be located in the reference areas of the General, Bio-Agricultural, and Physical Sciences Libraries as soon as possible. (Source: Organization, Management, and Staffing, p. 51)

IMPLEMENTATION: Discretion of the Committee

Recommendation 2d: The Study Team recommends that the Computer Planning Committee establish backup procedures for those times when computerized systems are unavailable. (Source: Technology and Public Services, pp. 9-10: "We must also recognize that a technological application, no matter how powerful, is a useless collection of electronic devices if it is not working.")

IMPLEMENTATION: Discretion of the Committee

Recommendation 2e: A sustained effort needs to be made toward the total integration of the Library's computerized systems. The goal should be toward a single terminal to access all systems. (Source: Technology and Public Services, pp. 9-10)

IMPLEMENTATION: On-going

The recent reorganization of the Library's reporting structure necessitates a clarification of functions and duties of the Division Heads.

RECOMMENDATION 3: The Study Team recommends that the Division Heads address the structure, responsibilities, lines of authority, and communication within the new organizational structure and present their recommendations to the University Librarian. In carrying out this function, Division Heads need to consult with Department Heads. The heads of the Sciences and Public Services Divisions need to pay close attention to the establishment of a structure for public services planning. (Source: Study Team; Organization, Staffing, and Management, p. 30: "Looking later at the reorganized structure, we recognize it as one among a number of viable patterns. We are not suggesting alternatives to it. We are suggesting that this organizational plan is still beset by unclarities and uncertainties.")

RESPONSIBILITY: Division Heads (Collections, Public Services, Sciences, and Technical Services)
IMPLEMENTATION: June 1, 1984

RECOMMENDATION 4: Based on a wide-spread perception of the staff that the University Librarian's Cabinet serves little substantive purpose, the Study Team recommends that the structure and purpose of the group be carefully examined. The Study Team first recommends that the group be renamed to avoid confusion with the responsibilities of the new Division Heads Group. One suggestion is "University Librarian's Advisory Group." It is further recommended that the group continue to meet, since it is the only opportunity for all Department Heads to convene. The Study Team specifically recommends:

--Meetings should be held once a month, although may occur more frequently if issues arise.

--There needs to be a formal agenda and that the agenda be the main item of business after any announcements from the UL. The individual responsible

for the issue under discussion needs to provide all pertinent background information, in the form of a draft document, if necessary, for the group's edification. This information must be distributed at least two days in advance of the meeting. It is the joint responsibility of the UL and every member of cabinet to place items on the agenda. The agenda is to be distributed to members a minimum of one week in advance of the meeting.

--Rather than asking each person for announcements, the UL should ask at the end of the meeting if there are any announcements from the group. This ensures that appropriate time is available for discussion of agenda items.

--Issues of broad Library concern may be brought to the group's attention by the University Librarian or by any member of the group. Such issues would include discussion on policy changes and their implementation.

--Minutes should continue to come out as soon as possible after the meeting. It is important that each department head make a concerted effort to make the Minutes available to staff as soon as they are received (there is a perception that not all department heads are doing this). As a communication device, the Minutes are important and each staff member must have reasonable access to them. It is possible that departments may need to provide more copies than has been the practice in the past. (Source: Study Team; Organization, Staffing, and Management, p. 32: "There have been comments at various levels of the Library organization concerning the purposes of ULC which at one time had appeared to involve itself with more substantive issues than it does at present. This is the perception of a number of staff members.")

RESPONSIBILITY: University Librarian
IMPLEMENTATION: May 1, 1984

Recommendation 4a: The Study Team recommends that the current Administrative Memorandum Manual be reviewed by both the University Librarian and Department Heads and be the topic for discussion in a ULAG meeting. The discussion should focus on the purpose of the manual, on guidelines for policy and accompanying procedure inclusion, and on what is appropriate to be included in such a manual. The manual is viewed as important for supervisors and staff in familiarizing them with the basic policies of the Library. This is viewed by the Study Team as a review rather than a major undertaking. (Source: Study Team; Articulating the Library's Public Services Programs, p. 64)

RESPONSIBILITY: University Librarian's Advisory Group
IMPLEMENTATION: Discussion at ULAG meeting, Spring, 1984

RECOMMENDATION 5: The Study Team recommends that the University Librarian clarify the relationship between the University Librarian's Advisory Group (previously known as ULC) and the Division Head's Group. The roles of each body need to be established. (Source: Study Team)

RESPONSIBILITY: University Librarian
IMPLEMENTATION: June 15, 1984

* RECOMMENDATION 6: The Study Team recommends that a Public Services Advisory Committee, replacing the Public Services Discussion Group, be constituted to

deal with a variety of public services issues. Many issues will be handled directly by the group with no need to refer them any further; other issues will require recommendations or action that need to be handled at another level. The Public Services Advisory Committee will report to the Division Heads Group in recognition of the overlapping issues that will be addressed. The Committee will meet once a month on a regular basis and more often if necessary. The Committee consists of the following members:

--Circulation (rotated between General and Sciences Libraries)
--Interlibrary Loans (rotated between General and Sciences Libraries)
--Reference (rotated between General and Sciences Libraries)
--Government Publications
--Collections Division
--Technical Services
--Administrative Assistant to Joan Chambers with responsibility for public relations and publications (ex-officio)
--IMRC/MSC and Music Library (rotate)
--Division Head (rotated between Sciences and Public Services Division Heads - ex-officio member)

The Committee will elect its own chair. The Division Head will be the liaison to the Division Heads Group. Members will rotate on an alternating two-year cycle in order to maintain some consistency. From the General and Science Libraries rotation, we need to assure that representation is equally balanced. People in these areas, however, represent a function rather than a Library or department and must consult and communicate with their functional constituents. All staff can volunteer for the Committee. Departments also have the option of selecting a member with the unanimous consent of that department. The Division Heads Group will make the final selection.

The Committee will report on their work to the staff at large through the Library Newsletter.

Some of the broad responsibilities of the Committee are:

--To design training program guidelines for public services to enhance and accompany departmental training and to ensure some consistency in approach in public services areas. Ongoing training needs must also be considered (for details, see Articulating the Library's Public Services Program, pp. 53-54).

--To establish a program of regular forums or workshops for staff in public services.

--To study the need for a Public Services Staff Orientation Coordinator (see Articulating the Library's Public Services Program, pp. 50-52).

--To produce a Public Services Resource Manual to be used at each public service point (see Articulating the Library's Public Services Program, pp. 49-50, for specific details on the design of the Manual).

--To work closely with the Library Personnel and Budget Officer in examining training in public services.

(Source: Study Team; Organization, Staffing, and Management, pp. 31-33; Articulating the Library's Public Services Program, pp. 4-5, 11).

RESPONSIBILITY: Division Heads Group
IMPLEMENTATION: April 15, 1984

The Study Team has further identified specific recommendations which have been assigned to the Public Services Advisory Committee:

Recommendation 6a: The Study Team recommends that the Public Services Advisory Committee explore the question of whether or not unbound issues of periodicals should continue to circulate. The Committee should consider such issues as the needs of the different colleges on campus and alternate options to full circulation or non-circulation. In examining the question, the Committee is to draw on the two recent surveys: the Faculty Survey administered through the Public Services Self-Study and the survey conducted by the Academic Senate Library Committee concerning the arrangement of periodicals. (Source: Study Team; Service Performance and Service Needs, pp. 24-25)

IMPLEMENTATION: Recommendation to Division Heads Group by June 1, 1984.

Recommendation 6b: The Study Team strongly recommends that the Public Services Advisory Committee plan a public service campaign to inform users of the possibilities of theft of personal belongings left unattended. Such publicity would include the use of signs in prominent places throughout the Library. (Source: Service Performance and Service Needs, pp. 34-35).

IMPLEMENTATION: Beginning of Fall Quarter, 1984

Recommendation 6c: The Study Team recommends that the Committee develop for consideration a Library Image Statement, designed to give public services staff a common idea of the Library's role and to assure that staff are working toward the same direction. Such a statement is to be presented to the Division Heads Group in draft form for discussion and implementation. In order to proceed, the Committee needs first to consider the section in the report from the Task Force on Articulating the Library's Public Services Program, pp. 47-48. (Source: Study Team; Articulating the Library's Public Services Programs, p. 47-48: "... all public services staff members are dedicated to serving the public and projecting a "friendly and helpful" image. But there is no feeling of an overall image of the Library's public service mission expressed either by staff or supervisors.")

IMPLEMENTATION: Begin Fall Quarter, 1984; submit draft to Division Heads Group by January 1, 1985.

Recommendation 6d: The Study Team recommends that general guidelines/techniques for handling referrals, complaints, and suggestions be incorporated into the Public Services Resource Manual. Individual departments need to include any specific guidelines in their own departmental manuals. Training in handling complaints is to be on-going. Forums need to be arranged on a frequent basis by the Committee to allow public service staff to exchange

ideas and to discuss approaches to problems. Appropriate films can be shown, with a follow-up discussion held afterwards. (Source: Study Team; Articulation of the Library's Public Services Program, pp. 48-49: "Supervisors seem to feel that the training they provide is more specific than staff members perceive it to be.")

IMPLEMENTATION: In conjunction with designing a general training program and producing the Resource Manual.

Recommendation 6e: The Study Team recommends that the Committee assume responsibility for planning three special programs: Participation in UCR Open House, National Library Week, and Fall Senior Preview Day. For details and further ideas, refer to the Report from the Task Force on Articulating the Library's Public Services Program, pp. 140-141. (Source: Articulating the Library's Public Services Program, pp. 140-141: "Efforts for the community at large have been minimal in the past.")

IMPLEMENTATION: Planning needs to begin in January, 1985 for programs falling within the 1985 calendar year. Reference Services in the General Library will continue to plan these programs for the 1984 calendar year.

Recommendation 6f: It is perhaps an understatement to say that the Library, and indeed the library world, are experiencing a transition from paper format to electronic format for information storage. For centuries, print was the predominant medium with which scholars and librarians worked, but in the last 10 years new media made available at lower cost have added another dimension to the traditional services provided to library users. This shift means that libraries must reexamine priorities to consider how to cope with the expansion of services. New priorities may be necessary to deal with reformatted information.

The Study Team recommends that the Committee, or a task force appointed by the Committee, establish minimal standards of systems literacy for all positions in public services. Three levels of knowledge are identified:

1. Primary part of position involves responsibility for the system.
2. Part of the position involves operating the system.
3. There is a general need to know how the system functions.

In carrying out this responsibility, the Committee or its task force needs to rank functions within each system, since it may not be necessary to know each function. Functions should be ranked from simple to complex. (Source: Study Team; Task Force on Technology and Public Services, pp. 7-8)

IMPLEMENTATION: January 1, 1985: Committee submits standards to Division Heads for discussion.
April 1, 1985: Division Heads finalize standards after appropriate discussion and consultation.

RECOMMENDATION 7. The Study Team recommends that the Circulation Task Force be reconstituted as the Circulation Advisory Committee with expanded membership to represent all circulation points. The Committee will discuss issues pertinent to circulation services. When the issue under consideration has broader public services implications, the same issue will be discussed in the Public Services Advisory Committee. The Circulation Advisory Committee will report to the Division Heads Group. The Committee will have the following functional representations:

--Sciences Division (rotates between Bio-Agricultural Library and Physical Sciences Library
--Music Library
--General Library Circulation
--CLSI Coordinator
--Government Publications
--Education Services
--IMRC/MSC

The Committee will select its own chair. Membership should rotate each year to allow greater staff participation. (Source: Study Team)

RESPONSIBILITY: University Librarian/Division Heads Group
IMPLEMENTATION: September 1, 1984

The Study Team also assigns responsibility for the following recommendations to the current Circulation Task Force or the Circulation Advisory Committee, dependent upon the time frame given.

Recommendation 7a: The Study Team recommends that the practice of telephone renewals be investigated and implemented on an experimental basis. (Source: Service Performance and Service Needs, pp. 22-23).

RESPONSIBILITY: Current Circulation Task Force
IMPLEMENTATION: Spring Quarter, 1984

Recommendation 7b: The Study Team accepts the recommendation from the Service Performance and Service Needs Task Force regarding recalls: "Given the requirements of the CLSI system and its handling of recalls, the Library is limited in its response to the expressed need for a guaranteed loan period before material can be recalled. The Circulation Advisory Committee should take advantage of the minor enhancement to the recall program provided in the new release to be loaded Spring quarter to relieve part of the recall problem. The manual procedures used in generating recall notices should be explored again by this group for means to assure a minimum guaranteed loan period for monographs." (Source: Service Performance and Service Needs, p. 23: "The most frequent expressions of frustration with circulation services which bear further investigation are the desire to renew books by telephone and the lack of a guaranteed loan period before material can be recalled.")

RESPONSIBILITY: Circulation Advisory Committee
IMPLEMENTATION: Fall Quarter, 1984

RECOMMENDATION 8. The Study Team recommends that the place of all committees be identified in the overall structure of the organization, including reporting relationships and the purposes of the committees. An organization chart of committees would be helpful in delineating these relationships. In addition, charges to all committees must be reviewed once each year, both by the person or group in charge of appointing the committee and by the committee itself. Finally, the Library Newsletter must contain a list, with brief charges, of all Library committees and their members. (Source: Study Team; Organization, Staffing, and Management, pp. 32-33)

RESPONSIBILITY: University Librarian
IMPLEMENTATION: Beginning of Fall Quarter, 1984

RECOMMENDATION 9. The Study Team recommends that the role of public relations and publications coordinator currently performed by the Administrative Assistant to the University Librarian be formalized in the position description and recognized by the staff. These two functions are viewed as complementing one another. Some of the recommended responsibilities for the position are:

--coordinating public relations efforts for the Library, such as answering questions from outside agencies about programs and services when appropriate and knowing to whom questions should be referred.

--maintaining appropriate communication with the Highlander and knowing deadlines and people to contact.

--collecting the publications of all departments and informing library staff of the availability of these publications through regular columns in the Library Newsletter.

--maintaining mailing lists and mailings to other libraries, including a list of what is sent to each. In particular, maintain lists of IEALC institutions, Museum of Photography, and University Extension.

--coordinating with the campus Public Information Office to keep them informed about events in the Library that they could highlight in their publications by sending someone in to cover a particular story.

--advising departments on format and color of publications.

--maintaining communication with the Receiving Department, whose responsibility it is to notify the Publications Coordinator when it is necessary to order new supplies of publications.

(Source: Articulating the Library's Public Services Program, p. 31)

RESPONSIBILITY: University Librarian
IMPLEMENTATION: Formalize by July 1, 1984

There appears to be some concern regarding the reporting relationships for those librarians involved in the development of the Library's collections (Task Force on Organization, Staffing and Management, p. 47-48). The Study Team spent considerable time spanning three days discussing the recommendations concerning the reporting structure for collections work. It is our conclusion that clarification is needed and we have attempted to provide it here. The organization described for the Sciences differs to reflect both the needs of the Sciences and a reporting structure that varies overall from that in the General Library.

RECOMMENDATION 10. It needs to be recognized that certain Library functions extend across structural lines to draw on individual talents. This holds true for collection development, reference services, and library instruction. Librarians who hold secondary job assignments enjoy a collegial relationship with the colleague who coordinates the work in that area. The nature of supervision is general rather than specific. A secondary evaluation of the individual's work is submitted to the individual's supervisor to be considered within the context of the entire job responsibility. It is the supervisor's responsibility to also evaluate the individual's work in these secondary areas in terms of the individual's entire responsibility. This structure is most noticeable in the area of collection development, where most of the academic staff have some involvement, but is also applied when an individual is assigned for part of his/her time to perform work in an area outside the primary responsibility. To clarify another point, an individual never writes a secondary eval-uation about one's direct or indirect supervisor, even though the supervisor may be collegially performing a secondary assignment, such as selection, within the functional area one coordinates. This exception to the usual practice of secondary evaluation is both understand-able and necessary.

Formal reporting for all collections must occur both within the Divisions in which the bibliographers primarily reside and to the Head of the Collections Division. This allows flexibility both in the design and expenditure of the budget. It is important for the sake of flexibility and continuity to retain budget control and monitoring within one Division. The three Division heads will each have specific interest or concerns which include different perspectives on collections as those collections relate to the work of the Division as a whole. It will require close coordination and communication between the bibliographer and the Division Heads to ensure that all needs are being met. (Source: Study Team)

Specific recommendations concerning this issue are:

Recommendation 10a: The Study Team recommends that there be one Sciences Bibliographer who coordinates the work of all selectors in the sciences. The Sciences Bibliographer, who also holds the position of Division Head for the Sciences, shares the ultimate authority and responsibility for the collections in the Sciences with the Head of the Collections Division. The Sciences Bibliographer participates formally in activities of the Collections Division and for this purpose is considered a member of that Division. The Head of the Collections Division submits a secondary evaluation of the Bibliographer's work to the supervisor. (Source: Study Team)

RESPONSIBILITY: Sciences Division Head
IMPLEMENTATION: July 1, 1984

Recommendation 10b: In the Public Services Division, the bibliographers for Government Publications and for General Reference report to the Department or Division Head for their area. As bibliographers, they participate fully and actively in the Collections Division, attending regular Collections Division meetings. General supervision is provided by the Head of the Collections Division, who submits a secondary evaluation of the work to the supervisor to be considered in the context of the formal review and included in the review packet. Final authority for the collections is shared by the Head of the Collections Division, the Head of the Public Services Division, and the bibliographers for the two collections.

IMPLEMENTATION: On-going

Recommendation 10c: The Study Team support strongly the voluntary nature of participating in the selection process. In determining whether or not an academic staff member participates, the demands of the primary job must be considered. Most importantly, the individual must have the appropriate subject and/or language background to successfully carry out the selector responsibilities and gain the respect of the faculty. (Source: Study Team)

RESPONSIBILITY: Division Heads Group
IMPLEMENTATION: Immediate and on-going

Recommendation 10d: Because the Division structure is so new to UCR, we recommend that this organizational structure for Collections be reviewed after one year to determine its effectiveness. Because the structure is somewhat unusual, it is constantly open to criticism. While this should be considered, an effort needs to be made to educate the Library Staff in the purpose of the structure. Constructive criticism needs to be taken seriously and should receive a considered response. (Source: Study Team).

RESPONSIBILITY: Division Heads Group
IMPLEMENTATION: June 30, 1985

Based on interviews with staff, concern has been expressed in two Task Force reports about the budgeting for new technology, particularly in the area of computerized literature searching. It is important that the Library's budget be extended conceptually and augmented financially to provide for electronic publications, the staff and equipment needed for new information services, and the conservation of all medias. This cannot be a campus responsibility alone. At the systemwide level, supplementary formulas must be written to provide for these new needs. The University of California Libraries Plan for Development needs to be updated to reflect the changes.

* RECOMMENDATION 11. The Study Team recommends that the University Librarian appoint a Task Force to begin work on June 1, 1984, to draft campus and systemwide proposals recommending a new budgeting formula for computerized literature searching and new information sources and technology. After

consideration and discussion of the systemwide proposal in the UCR Library, the University Librarian would take the proposal to Library Council for consideration. The importance of new methods of information retrieval and new information sources needs to be covered in a revised University of California Libraries Plan for Development.

Members of the Task Force include, but are not limited to, the Budget and Personnel Officer, the two search coordinators, the microcomputer coordinator in the Sciences Division, a librarian from the Collections Division, a Technical Services representative, and the Associate University Librarian.

As part of the Task Force work, the Budget and Personnel Officer is to contact his counterparts on the other UC campuses to learn how their budgets are structured to handle information retrieval. This information would be used as background by the Task Force. In conducting its work, the Task Force also needs to determine the purpose and direction of the computerized literature searching program and its priority in Library services. The role of the Library in end-user searching must also be considered. Another factor in budgeting is the provision for a consortium approach for the provision of many database services. Finally, the Task Force must conduct a needs assessment to determine how many faculty and researchers at UCR have a need for data archives, such as the census tapes. After completing this assessment, the Task Force must examine the Library's role in the provision of machine-readable data files.

Upon completion of a draft report, the Task Force should consider meeting with several faculty members to obtain their reactions. (Source: Study Team; Role of the Library in the Future, pp. 4-11; Technology and Public Services, pp. 66-68).

RESPONSIBILITY: University Librarian
IMPLEMENTATION: Task Force formed by June 1, 1984
Interim report due January 1,1985 Final report due April 1, 1985

Recommendation 11a: Upon completion of the above report or beginning when time permits, the Study Team recommends that the Task Force enter Phase II. Because the development of a national information policy is of vital concern to libraries and because UCR as an ARL Library is to play a major role in participating in the formulation of policy for research libraries, the Study Team recommends that the Task Force study the major issues involved in articulating a national public information policy and present the University Librarian with a position paper apprising her of the important issues on the topic. The University Librarian can then formulate UCR's thoughts on the matter. Faculty need to be consulted, since this is an area directly affecting them in the future. The Task Force also needs to consider:

a. For physical preservation and integrity of information, libraries in the not-for-profit sector must become the repositories of information sources. This responsibility can only be achieved by law -- possibly with tax incentives.

b. Copyright law must be enlarged to include electronic materials and to establish the right of librarians to have fair use and reuse of the newer formats of information.

c. The issue of fees for service must be addressed. Government financial support for information services must be legislated to maintain an informed citizenry.

The Task Force should refer to the reports from the Task Forces on Technology and Public Services, on Organization, Staffing, and Management, and on the Role of the Library in the Future for further details. (Source: Technology and Public Services, pp. 5-14; Organization, Staffing, and Management, pp. 37-41; Role of the Library in the Future, pp. 12-15).

RESPONSIBILITY: Task Force on New Technologies
IMPLEMENTATION: Begin report on April 1, 1985; report due date left to discretion of the University Librarian.

The user surveys revealed that all or parts of Education Services and the Music Library are utilized by a small, select yet highly satisfied clientele. Government Publications, although not a specialized or select service, also receives low use. Again, users expressed satisfaction with the services provided.

RECOMMENDATION 12. The Study Team recommends that a task force be appointed to carefully and thoroughly study Education Services and the Music Library. Such a study would determine how these services fit into the overall goals of the Library, whether or not some restructuring of services would result in an even higher quality of service, and what factors are involved in the use or non-use of the services. Should or could there be wider use on the part of the campus and/or community? The reporting structure for each of these areas must also be considered. Each service must be examined in light of demands placed on library services as a whole and whether or not the Library is allocating the budget in the best way based upon the priorities of both the Library and the campus. The Task Force should also look at Government Publications to see what factors contribute to a low use pattern. In all cases the importance of balancing quality and quantity must be kept in mind; the number of users is not the only true measure of service value. (Source: Study Team; Service Performance and Service Needs, p.28).

RESPONSIBILITY: University Librarian
IMPLEMENTATION: Begin study January, 1985

POLICY RECOMMENDATIONS

The need for a statement of Library-wide goals and priorities was brought out in several Task Force reports. So much of the role of the Library takes place outside the Library itself and beyond the local campus. It is important that overall goals be articulated for staff to help them to carry out services to users. Goals contribute to an understanding on the part of staff about how their functions fit into the Library as a whole. The following recommendations are presented in the spirit that an informed and aware staff is a more effective, supportive, and satisfied staff.

* **RECOMMENDATION 13.** The Study Team recommends that goal-setting occur each year using the following method:

a. The University Librarian provides the goals for the Library in relation to the Library's role on campus and systemwide, as distinct from Library department and Library specific goals and the Plan for the 80's.

b. Each department head proposes goals for the specific department for the next year. Both long- and short-range goals are to be included. These should refer to the Plan for the 80's.

c. As part of the goal-setting, department heads are to select the two or three goals they feel are crucial for the Library as a whole to consider as priorities for the next year.

d. Using the highly successful priority-brainstorming method introduced by the University Librarian at the last Management Workshop, the members of the University Librarian's Advisory Group (formerly ULC) arrive at a mutually agreed upon set of goals for the Library for the year. This is to be done at a Management Workshop.

e. The goals adopted are then compiled and distributed to all staff. These Library-wide goals also become the first section in the Planning Notebook.

f. In the middle of the year, the University Librarian's Advisory Group reviews the list of goals to see what the progress has been and what circumstances exist that may have prevented progress. Goals must then be shifted to reflect any changes that have occurred. It is important that new goals simply not be added on to what was already decided.

(Source: Study Team; Organization, Staffing, and Management, pp. 34-35)

RESPONSIBILITY: University Librarian
IMPLEMENTATION: Appropriate Management Workshop

Recommendation 13a: The Study Team recommends that one of the Management Workshops focus on the Library budget and Library expenditures in order to assist managers to better plan and carry out services. Budget allocations

also need to reflect goals, objectives, and service priorities. (Source: Study Team)

RESPONSIBILITY: University Librarian
IMPLEMENTATION: Appropriate Management Workshop

Recommendation 13b: The Study Team recommends that at the end of each fiscal year, the University Librarian give a "state-of-the-Library" talk, in which she reviews the activities of the year, noting accomplishments, and referring to the goals to note what may not have been completed and why. The talk should be a reflection of her interpretation of the past year and may also provide some insight into the next year. This communication is viewed as very important in helping to alleviate misperceptions of what the Library is doing. (Source: Study Team)

RESPONSIBILITY: University Librarian
IMPLEMENTATION: Beginning in June, 1985

Recommendation 13c: The Study Team recommends that the University Librarian compile an annual report based on her state-of-the-Library address that provides her perspective on the past and future of the UCR Libraries. This should not repeat the goals, objectives, and accomplishments of each department. (Source: Study Team)

RESPONSIBILITY: University Librarian
IMPLEMENTATION: Beginning in June, 1985

COMMUNICATION RECOMMENDATIONS

Surveys and interviews conducted by the Task Forces on Articulation and Organization revealed that many staff are uninformed about policy changes in public services. A major change is defined as one which has an impact on the provision of services. Such changes include but are not limited to hours of service, food and beverage policy, smoking policy, major stack shifts, and the Intercampus Bus Service. They are the changes about which staff need to know in order to communicate or interpret policies to users.

Changes affecting the provision of services occur in a variety of ways. They may be suggested by staff members, department heads, division heads, public feedback, or by the Public Services Advisory Committee. It must be recognized that there are many appropriate avenues for changes to be suggested and acted upon. The important point is that regardless of the method used for suggesting the change, staff must be kept informed. If staff are ignorant of changes, it is not to be expected that users are aware of them.

RECOMMENDATION 14. The Study Team recommends that the Division Heads Group coordinate and direct the implementation of major policy changes. Changes of lesser magnitude may be carried out by an individual department upon consultation with the appropriate division head and may not need to be handled by the Division Heads Group. Regardless of the magnitude of the change, a regular method for communi-cating changes to staff must be followed. (Source: Study Team)

RESPONSIBILITY: Division Heads Group
IMPLEMENTATION: April 15, 1984

Recommendation 14a: The Study Team recommends that the following guidelines be established for the purpose of informing staff of changes:

a. The Library Newsletter is to be used for communicating changes. A standard heading should be used so that it is clearly recognized.

b. The "Changes" notice devised by the Library Signs Task Force is to also be used to notify public services staff of changes.

c. Notices of policy changes affecting the provision of public services need to be added to the Public Services Resource Manual.

d. For major policy changes, it is important that staff understand the rationale behind the change since they are responsible for interpreting policy to the public. This may be best carried out in a meeting or meetings attended by one person designated to explain the rationale. At the same time, staff need to be reminded that a positive attitude is important in conveying information about a change.

(Source: Articulating the Library's Public Services Program, pp. 52-53: "No

clear channels for communicating types of changes exist, and there is no consistency in what sorts of changes are communicated through which channels... Only 58% [of staff members] reported getting information promptly.")

RESPONSIBILITY: Public Services Advisory Committee (for communicating most changes) in conjunction with Division Heads.
IMPLEMENTATION: Refine guidelines and publicize them by September 15, 1984.

Recommendation 14b: The Study Team recommends that when the Local Area Network (LAN) is in place, the system be utilized to inform staff about the latest changes and news in the Library. The system could also be used as a suggestion box for staff to refer their suggestions to the University Librarian or to the Associate University Librarian. (Source: Articulating the Library's Public Services Program, p. 52)

RESPONSIBILITY: Public Services Advisory Committee
IMPLEMENTATION: When a LAN is in place

RECOMMENDATION 15. In addition to holding a general staff meeting once each quarter, it is recommended that a formal suggestion program be implemented by the University Librarian beginning with the Spring, 1984 quarter. This would allow staff to forward suggestions to the University Librarian through a regular channel. If the suggestion is signed, it must be responded to or acknowledged by the University Librarian. An incentive program for accepted and acted upon suggestions is to be explored by the Budget and Personnel Officer in consultation with the University Librarian. (Source: Organization, Staffing, and Management, p. 31: "A corollary of the problem of information sent downward to staff is the perception that upward communication of the staff, particularly to the University Librarian, can be hindered by various supervisory layers where filtering/rejection of the individual staff member's concerns or suggestions may occur.")

RESPONSIBILITY: University Librarian
IMPLEMENTATION: Spring Quarter, 1984

RECOMMENDATION 16. The automation of library functions is costly and little understood by campus administration and faculty. The Study Team commends the University Librarian's efforts in the area of implementing additional library automation programs and in dealing with the issues of telecommunications on the systemwide level. We recommend that the University Librarian continue to make every effort to communicate frequently with campus administration and faculty on the Library's role in the provision of information services and the

importance of information technology in fulfilling this role. Communication can occur in a variety of ways, as noted in the recommendation concerning the coordination of technology. (Source: Technology and Public Services, p. 6)

RESPONSIBILITY: University Librarian
IMPLEMENTATION: On-going

RECOMMENDATION 17. The census of faculty conducted by the Service Performance and Service Needs Task Force revealed that faculty and Staff Research Associates prefer to be notified about new Library resources and capabilities through newsletters or memos. The Study Team suggests that communication with the faculty be transmitted via regular newsletters. The Sciences Division publishes a newsletter on a fairly regular basis that has been quite popular with faculty in the Sciences.

The Study Team recommends that a newsletter be instituted for the faculty in the Social Sciences and Humanities. Publication responsibilities are to be divided in the following ways:

--Editorial responsibility: The Head of the Public Services Division will appoint a member of the Reference Department to coordinate the writing and editing of the Newsletter. The Newsletter is to be published once each quarter, with a calendar established noting deadlines for publication.

--The Newsletter Editor should consider appointing a "reporter" from each department to provide information about new services or other areas of interest. There should be reporters from all Public Services areas, one from the Collections Division, and one from Technical Services.

--The Newsletter Editor may select an Editorial Board to assist in the editing procedure.

--The mailing list is to be maintained by the Library's Administrative Office and the Newsletter is to be sent out through that office.

When communicating with faculty, brevity is important. Newsletters must concentrate on the salient points rather than attempting to provide detailed information. Written communication is not to be used in place of personal contact with faculty; the purpose of the Newsletter is to supplement the personal communication. The University Librarian may want to consider the option of writing a column for each of the discipline-oriented newsletters rather than publishing an entire newsletter. (Source: Service Performance and Service Needs, pp. 49-50: "Faculty clearly exhibited a very strong preference for written communication about library resources and capabilities." Articulating the Library's Public Services Program, p. 32: "If there is a newsletter specifically for the sciences should there be one for the social sciences and humanities?")

RESPONSIBILITY: Public Services Division Head in consultation with the University Librarian
IMPLEMENTATION: First issue to appear, October, 1984

RECOMMENDATION 18. The Public Services Self-Study pointed out the need for better publicity of Library services. The Study Team recommends that department and division heads, along with the individual coordinating public relations, devote time to publicizing services to the extent to which the Library can meet possible demands. Various avenues for publicity include the Highlander, the Library's newsletters for external groups, and signs announcing changes in services. (Source: Service Performance and Service Needs, p. 3: "Occasionally faculty and students suggested implementing services already in existence. We therefore recommend a more aggressive publicity campaign for services." Articulating the Library's Public Services Program, pp. 30-33).

RESPONSIBILITY: Division and Department Heads
IMPLEMENTATION: On-going awareness and action

RECOMMENDATION 19. The Study Team recommends that an additional sign be posted at each reference point reading "Ask here for information or for assistance in using the Library". Such a sign may help to clarify the nature of services provided at those points. (Source: Service Performance and Service Needs, p. 4)

RESPONSIBILITY: Sign Coordinator
IMPLEMENTATION: May 1, 1984

Response to user feedback is a critical function in maintaining positive user relations and monitoring problem areas. Comments received through the suggestion box in the General Library's lobby cover a wide range of issues, many of which lie outside the scope of the Public Services Division. These include general suggestions, requests for materials to be added to the collections, complaints about smoking, elevators, and photocopiers (by far the largest recipient of comments), and comments on individual staff.

RECOMMENDATION 20. Because of the diversity of the comments and their importance in library planning, the Study Team recommends that the suggestion box be monitored by the Administrative Assistant to the University Librarian. This serves the purpose of keeping the UL informed of current user concerns, as well as ensuring that the suggestions are referred to the appropriate areas in the Library for a response. The Administrative Assistant needs to prepare a brief annual statement highlighting the list of the concerns. The Sciences Division should also send their suggestion box information to the Administative Assistant for inclusion in the report. In addition, when appropriate, suggestions or complaints that are recurring should be addressed by the Public Services Advisory Committee. (Source: Articulating the Library's Public Services Program, p. 67).

RESPONSIBILITY: University Librarian for initiating change
IMPLEMENTATION: September 1, 1984

Recommendation 20a: The Study Team recommends that the suggestion box be moved to a more prominent location in the lobby of the General Library. (Source: Study Team)

RESPONSIBILITY: Public Services Advisory Committee
IMPLEMENTATION: Fall Quarter, 1984

RECOMMENDATION 21. The Study Team recommends that an attractive easel be purchased for the General Library to be placed in the Lobby in order to highlight changes and news. This would notify users of any changes, including stack shifts, and could also be used to keep users updated on the status of MELVYL. The survey of users found that many users were simply not aware of changes in services, despite other methods of publicity. (Source: Study Team; Articulating the Library's Public Services Program, p. 96: "... a display highlighting changes and additions might bring greater awareness to all users about the latest in Library offerings.")

RESPONSIBILITY: For purchase, AUL in consultation with Public Services Division Head and Head of Circulation Services.
IMPLEMENTATION: Ordered by June 30, 1984; in place by Fall Quarter, 1984.

STAFF AND STAFFING RECOMMENDATIONS

Library staff are our single most important resource in ensuring successful, effective, and responsive public services programs. This section of the Report presents a number of recommendations related to staff: their training and development and ways in which we can improve the quality of their work life.

The issue of staff training and development was covered in several Task Force reports. The staff survey conducted by the Organization, Staffing, and Management Task Force indicated that only 48% of the staff felt that their training had been adequate. The Study Team strongly suggests that the University Librarian state the priority of staff training and development and affirm its importance tangibly through the allocation of funds.

RECOMMENDATION 22. It is felt that the publication issued by the Campus Personnel Office does an excellent job of listing and describing the courses they offer. To supplement this for the benefit of public services staff, the Study Team recommends:

a. That the Public Services Advisory Committee review the list and recommend some of the classes that have proved to have been generally useful to public services staff in the past.

b. Supervisors should routinely recommend appropriate classes to the employee during the annual evaluation.

c. The Library Personnel Office should announce the publication of the Campus brochure and list a few of the classes that have been attended by public services staff in the past.

(Source: Study Team; Articulating the Library's Public Services Program, p. 67)

RESPONSIBILITY: As indicated
IMPLEMENTATION: With publication of next Campus Course List

RECOMMENDATION 23. Staff training needs to occur at all levels, not just for beginning or non-managerial positions. New division and department heads also need some structured orientation to Library policies and procedures. The Study Team recommends that the Public Services Advisory Committee consider the needs of these individuals when examining the whole question of training. (Source: Study Team)

RESPONSIBILITY: Public Services Advisory Committee
IMPLEMENTATION: In conjunction with the development of other training guidelines.

The Study Team had a lengthy discussion on the problems of the classification system, with particular reference to the Library Assistant Series. There is some indication that an undetermined number of library staff feel that their jobs are too narrow and that there is a lack of opportunity for them to become more widely involved in Library or outside activities. There was no general agreement as to what type of reward system would be best. Because both the current staff personnel system and collective bargaining render it difficult to provide merit or accelerated merit to worthy and involved individuals who have reached the top of their step, the Study Team examined other avenues for enhancing Library staff positions.

RECOMMENDATION 24. The Study Team recommends that the following be explored:

a. Provide support to Library staff for attendance at appropriate meetings related to the job.

b. Encourage staff to attend training classes to help them move to a more responsible position.

c. Library Personnel needs to offer mini-sessions for those Library staff with the drive or interest to help them develop a conceptual basis for evaluating and applying their skills to other positions in which they might be interested.

d. Library Personnel can organize two seminars: one for all supervisors of Library Staff to review the evaluation forms, exchange review techniques, and discuss guidelines for evaluation; the other for Library Staff to acquaint them with what to expect during an evaluation period.

e. Campus personnel should conduct a seminar for Library Staff discussing the skills needed for other classifications on campus and how they might qualify for other positions. This would be a formalization of the useful chart equating campus jobs compiled by Joan Chambers about two years ago.

f. Qualified Library Staff who show the potential to become good librarians should be encouraged to attend a graduate program in library science. To support the individual, the Library needs to:

--Provide release time for class attendance when possible following the guidelines established in the Staff Personnel Manual, Section 260.

--Provide financial support when possible following the guidelines outlined in the Staff Personnel Manual.

--Allow the individual to work in a Library department of his/her choice as an intern.

--One of the Library support groups, such as the Friends of the Library (through the book sale or other means) and/or the Library Staff Association offers a scholarship to a Library Staff member to encourage him/her.

h. Similar treatment may also apply to other degree objectives.

g. Explore possible exchange programs for Library Staff with individuals in jobs outside the Library.

(Source: Study Team; Organization, Staffing, and Management, p. 4 and p. 36)

RESPONSIBILITY: Budget and Personnel Officer
IMPLEMENTATION: Begin exploring, January, 1985

Recommendation 24a: The Study Team recommends that a formal program, with guidelines, of job rotation be instituted for public services staff, particularly to help those at the top of their steps to develop other skills and offer relief from a possible dead-end job. (Source: Study Team; Organization, Staffing, and Management, p. 36)

RESPONSIBILITY: Public Services and Sciences Division Heads
IMPLEMENTATION: Begin exploring January, 1985

* RECOMMENDATION 25. The Study Team recommends that the Library explore the use of flexible staffing through the utilization of "floater" positions. When a vacancy occurs in public services or when it is felt that new staffing is needed in a unit, the concept of the floater should be considered. The individual should rotate only be-tween two departments in order to avoid the fragmentation problem and not feeling a part of any particular department. It is preferable that the two departments be within the same division, although this would be dependent upon the job functions. (Source: Study Team)

RESPONSIBILITY: Division Heads Group
IMPLEMENTATION: Discussion in Division Heads Group in Fall, 1984; implementation as appropriate.

Largely because of the application of automation to Library functions and procedures, many Library jobs have undergone substantial changes in the last few years. The new skills and jobs have been incorporated into the existing classification. These additions to the position often mean increased workloads, workloads with which the staff may find it difficult to cope. Many often find it necessary to take work home or work extended hours; there is no reward for this additional time. In evaluating positions, the supervisor and the Personnel Officer need to ensure that the Library Assistant series is the most effective location for the position. It is possible that some positions need to be reclassified into a different series.

RECOMMENDATION 26. Because jobs have undergone many changes, the Study Team recommends that:

a. The supervisor and the individual review both the job card and the job classification as a routine part of the performance eval-uation procedure. This is beyond the regular opportunity the individual has to request an audit of his/her position for reclassification. (Source: Study Team)

RESPONSIBILITY: Supervisors
IMPLEMENTATION: During evaluation period for each employee

b. Conduct an inventory of public service positions in all Libraries. The inventory includes:

--a very brief description of job duties in each position
--a list of systems of which the knowledge is essential for each position.
--a list of systems of which the knowledge would be helpful in accomplishing the job duties for each position.

The inventory would be utilized to determine the appropriateness of the current classification. In addition, it should be used by the Public Services Advisory Committee as they establish minimal standards for systems literacy (see Study Team Recommendation 6f). (Source: Technology and Public Services, p. 7)

RESPONSIBILITY: Department Heads
IMPLEMENTATION: September 30, 1984

RECOMMENDATION 27. The Study Team recommends that the Budget and Personnel Officer review the local interpretation of the Library Assistant series, which most supervisors find difficult to work with because of its rather unclear examples. (Source: Study Team)

RESPONSIBILITY: Library Budget and Personnel Officer
IMPLEMENTATION: October 1, 1984

* RECOMMENDATION 28. It is difficult from the results of this Public Services Self-Study to determine the extent and cause of frustration due to fragmentation. Because this subject is of general concern to all staff, the Study Team recommends:

a. That a survey of librarians in public services be conducted to determine why and where individuals feel fragmented.

b. The survey would be based on a grid model, whereby the individual would list functions by whether they were urgent/important, urgent/not important, not urgent/important, or not urgent/not important. The individual would also note how much time they spend on each function and how much time they feel they should be spending. Another question with which the individual would deal is whether or not the function or some of its pieces are

appropriate to the person's level or should be reassigned.

c. After completion of the survey, each department reviews its results and makes recommendations based on these results.

d. The Department Head, Division Head, and the Budget and Personnel Officer then look at the surveys and results of departmental discussion to see if there is a problem and if so, what the nature of the problem is. The purpose of the review is to determine how many functions falling into the important/urgent or important/not urgent category can be effectively handled by an individual. At what point does the quality of the work suffer? A premise is that individuals need a sense of accomplishment in order to realize job satisfaction and that feelings of frustration about fragmentation have less to do with the number of functions one performs than with the quality of the work it is possible to perform.

e. The Study Team recommends starting with Public Services librarians in order to test the approach and results. If meaningful, the same survey can then be expanded to all public services staff. An added benefit is that an individual may discover in the process some functions that could be discontinued altogether or modified in some way.

(Source: Study Team; Organization, Staffing and Management, pp. 14-18: "The diversity of high priority items when combined with a multitude of additional assignments tend, then, toward fragmentation. However ... the diversity of assignment is viewed as being "stimulating" and enjoyable. Hence, the paradox remains, and the questions of how much fragmentation leads to true fragmentation thus rendering one ineffectual and incompetent remains somewhat unsolved")

RESPONSIBILITY: Division Heads
IMPLEMENTATION: Begin discussions on proceeding with sur vey, November, 1984

RECOMMENDATION 29. The Study Team recommends that the Social Sciences and Humanities Bibliographers serve on a regular basis at a reference desk as a way of enhancing collection development which is responsive to users' needs. The assignment needs to be flexible, taking into consideration other forms of major public services involvement, such as teaching the Library Research Strategies class. (Source: Organization, Staffing, and Management, p. 49)

RESPONSIBILITY: Collections Division Head/Division Heads Group
IMPLEMENTATION: Fall Quarter, 1984

RECOMMENDATION 30. The Study Team recommends that the Library's subject and language skills can and should be increased by making needed backgrounds, training, and experience requisite or highly desirable for appointment. In academic positions, the needs of the Library as a whole should be considered.

The Study Team feels that it is desirable to incorporate a statement of this nature into the revised Administrative Memorandum #5, Academic Recruitment. (Source: Organization, Staffing, and Management, pp. 25-26)

RESPONSIBILITY: Department and Division Heads
IMPLEMENTATION: Begin with the next academic appointment

Recommendation 30a: When subject and language backgrounds are needed, the Library through Division and Department Heads must actively encourage with release time and financial support study and coursework in disciplines deemed necessary to the functioning of the Library. (Source: Organization, Staffing, and Management, p. 26)

RESPONSIBILITY: University Librarian/Division Heads
IMPLEMENTATION: Immediate and on-going

RECOMMENDATION 31. The Study Team recommends that the functions of coordinator of Library instruction and coordinator of computerized literature searching in both the General and Sciences Libraries be rotated on a two-year basis when possible and appropriate in order to allow greater professional development for librarians, to facilitate new ideas and approaches, and to provide respite for the coordinator. (Source: Study Team; Organization, Staffing, and Management, p. 40)

RESPONSIBILITY: Responsible Department Heads in consultation with Division Heads.
IMPLEMENTATION: June 1, 1984 if change is to be made

RECOMMENDATION 32. Services falling under the Library's purview located in remote areas suffer from a lack of staff involvement in overall Library activities. The Study Team recommends that in order to enhance these services by giving the staff a broader perspective and sense of belonging to the organization, the staff in the Music Library, Instructional Media Resources Center, and the Media Studies Center be encouraged to participate in Library-wide activities, such as involvement on task forces and committees. Department heads for these areas must make it possible for staff to have these opportunities. (Source: Organization, Staffing, and Management, p. 27: "The Music Library's public service Library Assistant feels isolated as she lacks avenues of daily communication with other library staff.")

RESPONSIBILITY: Associate University Librarian
IMPLEMENTATION: Fall Quarter, 1984

In concluding this section on Staff and Staffing, the Study Team feels impelled to address the issue of utilizing Library Assistants and graduate students at reference desks which was recommended by the Organization Task Force as an area to be studied. (Organization, Staffing, and Management, p. 51). The Study Team does not support exploring the use of Library Assistants at reference points as a general rule. There may be times and/or situations when it is more appropriate than in other situations. The survey completed by public services staff concerning their job function priorities may reveal a need to study the appropriateness of this staff utilization in the future.

It was felt that the motive behind the recommendation to look into different staffing levels at reference points on a regular basis arose from the desire to ease fragmentation problems of reference staffs, allowing them more time for other duties. While this is admirable, it is working under the false assumption that reference desk service has a lower priority for reference personnel than other duties they perform.

SERVICES RECOMMENDATIONS

This section of the Study Team Report covers a wide variety of services, from library instruction to collections. Headings are not assigned, although recommendations concerning the same topic fall together.

Although the UCR Libraries currently offer a wide array of library instruction programs, particularly on the undergraduate level, the Public Services Self-Study revealed the need for a systematic prioritizing for building upon the existing structure. An extensive and thorough discussion of the issue appears in the Task Force Report on Articulating the Library's Public Services Program. The Study Team concurs with the following short-range priorities: Graduate students, New Faculty, and UCR staff. After an examination and discussion of the recommendations, the Study Team presents the following recommendations in priority order.

RECOMMENDATION 33. The Study Team recommends that graduate students receive instruction through the following techniques (for details, refer to the Report from the Task Force on Articulating the Library's Public Services Program, pp. 135-137; the Study Team supports the specific recommendations found in this section):

a. Advanced Research Seminars/Course-integrated instruction
b. Publication: "Library Services for Graduate Students."

In addition to the components to be included as recommended by the ALPS Report, the Study Team further recommends that the publication include information on collections and data bases and on services of the Graduate Student Association when appropriate. There should be separate publications for the Sciences and the Social Sciences/ Humanities in order to highlight information specific to each area.

c. Thesis and Dissertation Seminar

(Source: Articulating the Library's Public Services Program, pp. 135-137: "Of the Library's high-priority user groups, graduate students seem to receive the least attention, both in quantity and quality.")

RESPONSIBILITY: Library Instruction Coordinators for the General Library and the Sciences
IMPLEMENTATION: Begin Fall, 1984

RECOMMENDATION 34. The Study Team recommends that the General Library produce a brochure entitled "Library Services for New Faculty" modeled on the publication done by the Sciences Division in 1983. (Refer to the ALPS Task Force Report, pp. 137-138 for further information on designing and producing the publication). (Source: Articulating the Library's Public Services Program, pp. 137-138: "Faculty members are reached through a number of programs

and informal contacts, but new faculty members who have the most immediate need for general information about the Library are probably not receiving adequate attention.")

RESPONSIBILITY: Pubic Services Advisory Committee in consultation with library instruction coordinators
IMPLEMENTATION: Publication ready for Fall 1984 Quarter

Other recommendations concerning new faculty, such as holding a reception, are to be planned for the Fall, 1985 quarter. A discussion of approaches to the reception appears in the ALPS Task Force Report, pp. 138-139.

RECOMMENDATION 35. The Study Team recommends that the Library Instruction Coordinators explore the possibility of offering a class on library use through the Campus Employee Training and Development Program. If this is not feasible, the Library can offer a seminar or workshop on its own. Further details appear in the ALPS Report, pp. 139-140. (Source: Articulating the Library's Public Services Programs, pp. 139-140: "In the recent past, only two special programs have been directed toward UCR staff [in the Sciences].")

RESPONSIBILITY: Library Instruction Coordinators
IMPLEMENTATION: Spring Quarter, 1985 (to begin exploration)

RECOMMENDATION 36. The Study Team recommends that a conscious effort be made to incorporate new technological applications that affect public services into the instructional programs. These technological applications include but are not limited to MELVYL, online database searching, CLSI, and Innovacq. (Source: Technology, pp. 8-9: "As the Library introduces new technology to provide enhanced access to information resources, the Library must develop systematic programs to educate Library users so that they may take full advantage of the enhanced access capabilities brought upon by the new technology; Role of the Library in the Future, p. 26)

RESPONSIBILITY: Library Instruction Coordinators
IMPLEMENTATION: Fall, 1984

RECOMMENDATION 37. The Study Team recommends that the use of technology for the Library's instructional programs be explored. Specifically, the use of audio-visual materials and computer-assisted instruction (CAI) need to be examined. (Source: Technology, and Public Services, p. 9)

RESPONSIBILITY: Library Instruction Coordinators in consultation with the Director of IMRC/MSC
IMPLEMENTATION: Begin process of exploration, January 1985

Four of the Task Forces identified a need for an expanded public services publication program. The following recommendations are based on the work of these Task Forces.

RECOMMENDATION 38. The Study Team recommends that course-integrated library instruction include written guides covering resources, research strategy, and applicable library services. These guides are to be distributed in the class. This is already being done for most course-integrated instruction carried out by the Libraries. (Source: Service Performance and Service Needs, p. 31: "Overall, both students and faculty indicated that they are most interested in written guides ...")

RESPONSIBILITY: Library Instruction Coordinators/all librarians who provide library instruction
IMPLEMENTATION: On-going

RECOMMENDATION 39. The Study Team recommends that each public service point develop a handout describing their services. In addition, a handout for any specialized service needs to be developed. As much as possible, handouts describing specific functions should be combined into one handout. The following areas do not now have flyers and need to develop them:

CAGE
Media Study Center
Instructional Media Resources Center
Special Collections
Music Library
Collection Development
Circulation Services
Bio-Agricultural Library
Physical Sciences Library

(Source: Articulating the Library's Public Services Program, pp. 30-31; p. 35: "Discussion with public service staff and the four surveys conducted indicate the need for written guides for services.")

RESPONSIBILITY: Immediate responsibility for the development of handouts is assigned to appropriate department heads, with review by division heads. Departments heads need to coordinate the work wherever overlaps occur. Future monitoring is assigned to the Public Services Advisory Committee.
IMPLEMENTATION: Fall quarter 1984 for completion of handouts.

Recommendation 39a. The Study Team recommends that the following specialized services be considered for incorporation into the publications program: Typing Room, Group Study Rooms, Student Lounge, Copy machines, change machines, photoduplication services, maps, microforms and readers, IEALC, and using the Library's catalogs. (Source: Articulating the Library's Public Services Program, p. 35)

RESPONSIBILITY: Public Services Advisory Committee
IMPLEMENTATION: Begin discussion by January 1985

RECOMMENDATION 40. The Study Team recommends that a directory-format guide to the Library's computerized systems be developed for patron use. The guide should briefly describe each system with which the user has contact, whether through a librarian or individually, pointing out the information included and the limitations. The guide would include information on MELVYL, Innovacq, CLSI, OCLC, and online database searching. (Source: Technology and Public Services, p. 9)

RESPONSIBILITY: Public Services Advisory Committee
IMPLEMENTATION: Fall Quarter, 1984

RECOMMENDATION 41. The Study Team recommends that a quick reference chart of basic system commands be developed for each computer system to aid users in utilizing the system. (Source: Technology and Public Services, p. 8; Study Team)

RESPONSIBILITY: Systems Coordinators, with review by Public Services Advisory Committee
IMPLEMENTATION: Fall Quarter, 1984

RECOMMENDATION 42. The Study Team recommends that a simple, direct publication listing the basic circulation services be developed and given to new students in IMRC at the time they obtain their Library/photo identification cards. The same publication can be handed to users who obtain their cards at the General Library. It is expected that this will increase a new user's knowledge of basic services. (Source: Service Performance and Service Needs, p. 23)

RESPONSIBILITY: Circulation Task Force (Advisory Committee)
IMPLEMENTATION: Fall Quarter, 1984

RECOMMENDATION 43. Because publications are often only as effective as the way in which they are displayed, the Study Team recommends strongly that literature display racks be purchased for Library public services areas. Estimated costs of display racks are included in the ALPS Report, p. 37. (Source: Articulating the Library's Public Services Program, p. 32: "Available publications are not accessible to the public in an inviting manner. Most publications are displayed lying flat on counters or on

desks...Handouts lying flat on counters are difficult to see." Service Performance and Service Needs, p. 4)

RESPONSIBILITY: Publications Coordinator will order in consultation with Libraries' Public Services and Sciences Department Heads, the Budget and Personnel Officer, and the AUL.
IMPLEMENTATION: Ordered by June 30, 1984; in place by Fall quarter, 1984.

RECOMMENDATION 44. The Study Team recommends that the Public Services Advisory Committee review the priorities for the display of publications proposed by the ALPS Task Force, p. 36, and either accept or modify the guidelines as a model to be followed in the future. (Source: Articulating the Library's Public Services Program, p. 36)

RESPONSIBILITY: Public Services Advisory Committee
IMPLEMENTATION: During Fall Quarter, 1984

The Task Forces on Organization and on Technology devoted considerable thought to the subject of computerized literature searching. The following recommendations address that subject.

RECOMMENDATION 45. The Study Team recommends that the search coordinators, in consultation with all searchers, recommend to the Division Heads a user fee structure for computerized literature searching to bring UCR more in line with the charges practiced by other UC campuses. The recommendation must be submitted to Division Heads by May 1, 1984, in order to consider it and, after review by the University Librarian, forward it to the Campus Recharge Committee for approval. (Source: Study Team; Technology and Public Services, p. 12; 67-68; Organization, Staffing, and Management, p. 38: "Based on comparative data on fee structures of the UC Libraries, it appears that UCR's fee structure is among the highest for campus users.")

RESPONSIBILITY: Search Service Coordinators
IMPLEMENTATION: May 1, 1984

RECOMMENDATION 46. The Search Service Coordinators, in consultation with all searchers, need to differentiate the practical levels of search skills and recommend to the Division Heads of Public Services and the Science a plan for training reference librarians to appropriate levels of searching. (Source: Study Team; Technology and Public Services, p. 12; p. 85; Organization, Staffing, and Management, p. 40)

RESPONSIBILITY: Search Service Coordinators
IMPLEMENTATION: July 1, 1984

RECOMMENDATION 47. The Study Team recommends that recommendations concerning funding for in-house training needs to be put forth to the Division Heads by the Search Service Coordinators after they have written the training program. Without such training guidelines, it is difficult to determine specifically for what the funds are used. (Source: Study Team; Organization, Staffing, and Management, p. 40)

RESPONSIBILITY: Search Service Coordinators
IMPLEMENTATION: September 1, 1984

RECOMMENDATION 48. The Study Team recommends that the existing travel guidelines be followed in support of required training for computerized literature searching and that the funds to support the training come from the supplies and equipment (general travel) fund rather than from the Search Services fund. (Source: Study Team; Technology and Public Services, p. 12; p. 78; Organization, Staffing, and Management; p. 38: "In order to balance [a search deficit], the searchers had to reduce the number of training workshops they could afford to attend. . . These coping and self-censoring efforts could have had a negative effect on their ability ... to stay current with computer literature search developments.")

RESPONSIBILITY: University Librarian
IMPLEMENTATION: July 1, 1984

RECOMMENDATION 49. The Study Team recommends that the search service coordinators, in consultation with all searchers, produce guidelines for ready-reference searching. It is important to define what is and what is not ready-reference searching, as well as determining what user populations are to be served. A determination of the need for additional funding depends upon these guidelines. (Source: Study Team; Technology and Public Services, p. 13)

RESPONSIBILITY: Search Service Coordinators
IMPLEMENTATION: Fall, 1984

RECOMMENDATION 50. The Study Team recommends that the search service coordinators design a brief evaluation form to be utilized by users to provide comments on the service they received. It is expected that this will help to improve the service. Results should be shared at meetings of searchers. (Source: Organization, Staffing, and Management, p. 40: "Presently, there is no evaluation mechanism of this service or of the searchers' performance in a meaningful way... It would be useful to have a more systematic approach to

performance evaluation of both the searchers and the program/service, especially if this program will be given extra funding support by the Library.")

RESPONSIBILITY: Search Service Coordinators
IMPLEMENTATION: Fall Quarter, 1984

RECOMMENDATION 51. The Study Team recommends that the University Librarian, through a proposal to Library Council, support regular regional meetings of the UC Data Services Coordinators Group as a means of communication, sharing of common problems, discussing and planning of training needs, and recommending budgeting alternatives. A general meeting once each year may be necessary, although it may suffice that the Chair attend regional meetings at times to provide continuity between the northern and southern groups. (Source: Study Team; Technology and Public Services p. 13, p. 80)

RESPONSIBILITY: University Librarian
IMPLEMENTATION: Fall, 1984

RECOMMENDATION 52. The Study Team recommends that the Librarian Career Development Fund also be utilized in support of basic vendor training for computerized literature searching and online time for librarians outside public services who are interested in broadening their skills. (Source: Study Team)

RESPONSIBILITY: University Librarian
IMPLEMENTATION: Immediately

RECOMMENDATION 53. Issues related to the computerized literature searching service should be discussed at regular meetings of reference staff in all libraries in order to keep all reference staff informed. The search coordinators need to hold monthly meetings for their areas and periodic joint meetings with all search units as a way of sharing common concerns. Librarians who are not searchers are encouraged to attend meetings of searchers to learn more about the service. (Source: Study Team; Organization, Staffing, and Management, p. 41)

RESPONSIBILITY: Search Service Coordinators
IMPLEMENTATION: Immediately and on-going

RECOMMENDATION 54. Library Instruction Coordinators and Search Service Coordinators need to remain in close contact in order to share information useful in promoting these services. (Source: Study Team)

RESPONSIBILITY: As Indicated
IMPLEMENTATION: Immediately

* RECOMMENDATION 55. In light of the growing importance of Interlibrary Loan to the scholarly community and the perception that the service could be improved with additional staffing and technological advances, the Study Team recommends that a study be undertaken of interlibrary loan functions in the UCR Libraries to examine how we can improve upon what we have. Such a study should take into consideration those studies conducted by the Division of Library Studies and Research, such as that concerning the Availability of Materials carried out over one year ago. The study must also address the use of technology. The outcome would be a position paper on a cohesive approach to interlibrary loan concerns by the UC system, to be proposed to Library Council. (Source: Study Team)

RESPONSIBILITY: Initial consideration about how to approach, define, and assign responsibility for the study is to be discussed by Division Heads.
IMPLEMENTATION: Division Heads discuss in Spring Quarter and assign responsibility and time frame by July 1, 1984.

RECOMMENDATION 56. The Study Team support the Service Performance recommendation that the University Librarian consider keeping the Libraries open one or two evenings a week until 7pm or 9pm during the summer regardless of whether classes are in session on an experimental basis. The Libraries need to aggressively advertise this fact and monitor the amount of actual use received during the trial period. Only circulation points will be staffed during these times. Additional G. A. will be required to provide staffing. If use is too small to warrant the expenditure, the hours should be discontinued and the experiment cited in response to complaints about hours. (Source: Service Performance and Service Needs, p. 21)

RESPONSIBILITY: University Librarian/Circulation Staffs
IMPLEMENTATION: Summer, 1984

RECOMMENDATION 57. The user surveys revealed a general concern regarding the lack of Library hours during the December closing of the campus. This presents a problem for faculty and graduate students who must prepare for Winter Quarter courses and grant proposals. The Study Team recommends that the University Librarian request that the Libraries be exempt from the holiday closing on an experimental basis. The hours could be limited to 1pm-5pm weekdays, with only circulation services provided. Minimal staffing should be utilized. (Source: Service Performance and Service Needs, p. 3; Study Team)

RESPONSIBILITY: University Librarian
IMPLEMENTATION: December, 1984

RECOMMENDATION 58. Three of the task forces - Articulating the Library's Public Services Programs; Organization, Staffing, and Management; and Service Performance and Service Needs - addressed the subject of establishing an information desk. The ALPS Task Force perceived through discussions with staff some problems with referrals. It is unclear whether the problem is with erroneous referrals or simply that staff feel uncomfortable sending a user to yet another station. The Study Team feels that concrete evidence to support the establishment of an information desk does not exist and that solving possible referral problems would best be handled through other means. In our minds, the value of such a desk is questionable when compared to the amount of staff time that would go into training and the increase required in personnel funds to support such a function. The Study Team supports instead increased attention to staff training in referrals, public services forums designed to allow staff to exchange ideas and information about referral techniques, and the production of a public services resource manual.

The Study Team recommends, however, that an Information Desk be established in the lobby of the General Library for the first two weeks of the Fall Quarter on a trial basis to help new users become acquainted with the Library's services. If deemed successful, the desk could be staffed for the first two weeks of each Fall Quarter. The desk is to be staffed by interested Library Staff who are provided training in the function. (Source: Study Team; Service Performance and Service Needs, p. 5; Organization, Staffing, and Management, p. 28; Articulating the Library's Public Services Program, p. 95)

RESPONSIBILITY: Public Services Division Head
IMPLEMENTATION: Fall Quarter, 1984

The next three recommendations concern the collections and are based on information gathered from the user surveys. Assessment of the Library's collections has been on-going and promises to occupy a major part of the Collection Division's time and energy during the next two years. Although user concerns about the collections have surfaced, it is important to remember that the collections cannot and will never meet all individual research needs.

RECOMMENDATION 59. The Study Team recommends that the Collections Division look into the needs of both the School of Education and the Graduate School of Management in order to determine how their collection needs could be more adequately supported. Specifically, additional journal needs for the Graduate School of Management must be explored (we recognize that a meeting occurred between several bibliographers and faculty from GSM in early 1983 in which the journal needs were discussed and acted upon). (Source: Service Performance and Service Needs, pp. 41-44; Study Team)

RESPONSIBILITY: Social Sciences Bibliographer/GSM Selector
IMPLEMENTATION: June 15, 1984

RECOMMENDATION 60. The Study Team recommends that appropriate bibliographers and selectors meet with the Humanities/Social Sciences Faculty to determine the feasibility of augmenting the General Library collection in areas which are currently deemed inadequate for research purposes. In examining this problem, the Collections Division would find it useful to obtain from the faculty survey the "quality of collection" question broken down by school to pinpoint whether this problem exists for all Humanities and Social Sciences disciplines or only for a few. (Source: Service Performance and Service Needs, pp. 41-44)

RESPONSIBILITY: Bibliographers and Selectors for disciplines identified as needing further examination.
IMPLEMENTATION: Throughout 1984-85 academic year

RECOMMENDATION 61. The Study Team recommends that the Sciences Libraries Division, in conjunction with the Collections Division Head, look at the "quality of collections" question by CNAS discipline to ascertain whether particular disciplines are experiencing difficulties with the collection. If so, these departments need to be consulted in order to work out a solution to the problem. It would also be useful to look at the "need for increasing the journal collection" question by CNAS department in order to determine whether specific departments are in need of increasing the number of journals in their discipline. (Source: Service Performance and Service Needs, pp. 41-44)

RESPONSIBILITY: Sciences Bibliographer and appropriate selectors/Collections Division Head

RECOMMENDATION 62. The survey of users revealed that Government Publications is one of the least used areas in the Library. It is probable that much of the reason behind this is the lack of bibliographic integration with other Library materials. The Study Team recommends that the Head of Government Publications, in consultation with the staff of the Department, the Head of Public Services, and the Head of Cataloging, study and prepare a position paper on the feasibility of integrating UCR's government publications into MELVYL. Various options, such as the loading of the GPO tapes into MELVYL and its possible time-frame and DLA commitment, need to be explored. (Source: Study Team; Technology and Public Services p. 9)

RESPONSIBILITY: Head of Government Publications
IMPLEMENTATION: December 1, 1984 (position paper completed)

Although photocopying services are not actually "library" services, in the minds of users they differ little from other types of assistance provided

by the Library. Several campus administrators interviewed by the ALPS Task Force expressed concern about the quality of service and equipment for copying.

RECOMMENDATION 63. The Study Team recommends that a thorough examination of the Library's photocopy services be undertaken. This in-cludes the copiers for public use, Library Departmental copiers, and the Photocopy Service. The process of examination includes looking at the services in other libraries and on campus (such as the Graduate Student Association) and a consideration of whether or not the Library should purchase its own equipment. At the same time, the hours of the Photocopy Service should be examined.

(Source: Study Team; Organization, Staffing, and Management, p. 53; Articulating the Library's Public Services Program, p. 95: "The copying machines are a source of friction for many patrons and give a very bad impression of the Library.")

RESPONSIBILITY: Budget and Personnel Officer (report findings and conduct discussion at ULAG (ULC) meeting)
IMPLEMENTATION: May 1, 1984 (begin to examine)

The Task Force Report from Articulating the Library's Public Services Program, pp. 151-165, contains an excellent section on External Users, to which we draw the attention of the Library staff. Although it is difficult to determine the impact of external users on service points, the Task Force recommended that current service levels be maintained, but that the situation continue to be monitored. This can be done through the statistics retained on use by external users. The Study Team particularly endorses the following recommendation:

RECOMMENDATION 64. The Study Team recommends that participation in IEALC Annual Meetings be expanded to include reasonable representation from those departments directly affected by the program. In addition, information programs with IEALC member institutions could be explored. (Source: Study Team; Articulating the Library's Public Services Program, p. 154)

RESPONSIBILITY: Associate University Librarian
IMPLEMENTATION: In place by the next IEALC Annual Meeting

FACILITIES RECOMMENDATIONS

* RECOMMENDATION 65. The Study Team recommends that a Task Force on Space be appointed to plan for future Library space needs. Complete, in-depth study of overall needs must be conducted of existing Library space and physical layout before any further minor capital improvement projects are undertaken. The end result would be a comprehensive University Library space/use plan for the 1990's. Such a plan should include alternatives for solving space and physical layout problems identified, since requisite funding may take many years. (Source: Articulating the Library's Public Services Program, p. 70)

RESPONSIBILITY: University Librarian and Division Heads
IMPLEMENTATION: Appoint by October 1, 1984

* RECOMMENDATION 66. The survey of student users pointed out the need for maintaining a typing room in the General Library. The current facility is inadequate both because of its location and its lack of reasonable equipment. The Study Team strongly supports the maintenance of a typing facility in the Library. As its first duty, the Task Force on Space is to explore if such a facility can be supported in the General Library and if not, what campus options are available. In carrying out its charge, the Task Force should:

a. Examine the possibility of charge-backs/cost-recovery
b. Find an appropriate and visible location for the room (vandalism tends to be high when the room is not in a location visible to staff)
c. Explore the possibility of funding support from the Associated Students of UCR and the Graduate Student Association
d. Look at examples of successful typing room operations, such as that at UC Irvine.

The Task Force needs to determine how much it costs to begin and maintain a respectable typing room operation and how the Library can achieve this goal. (Source: Service Performance and Service Needs, p. 34: "Satisfaction among users of these support services is very high with only one exception, the typing room. There were a plethora of comments, mostly from undergraduates, all indicating the need to upgrade the service.")

RESPONSIBILITY: Task Force on Space
IMPLEMENTATION: Immediately begin studying upon task force appointment

RECOMMENDATION 67. The Study Team recommends that safety issues in terms of facilities be the first priority over new facilities projects. The following safety issues need to be examined:

a. Does the Library have enough fire extinguishers?
b. Does the staff know how to use the fire extinguishers?
c. Do fire extinguishers get inspected frequently?
d. Are fire drills frequent enough?

(Source: Articulating the Library's Public Services Program, p. 5)

RESPONSIBILITY: AUL/Budget and Personnel Officer
IMPLEMENTATION: July, 1984

RECOMMENDATION 68. The Study Team recommends that the first facilities money available be used for seismic bracing and sprinkler systems in the Libraries. (Source: Articulating the Library's Public Services Program, p. 5)

RESPONSIBILITY: University Librarian
IMPLEMENTATION: Immediately upon feasibility

RECOMMENDATION 69. The Student user surveys showed some dissatisfaction with Library hours. This could reflect a need for a "study hall" more than with a lack of access to library materials or services. The Study Team recommends that the University Librarian discuss with Campus Administration the possibility of establishing a study hall area in another building for use by students after the Library closes, initially just during midterms and finals but perhaps during the school year if there is a need. (Source: Service Performance and Service Needs, pp. 20-21)

RESPONSIBILITY: University Librarian
IMPLEMENTATION: Fall, 1984 and on-going

ANCILLARY RECOMMENDATIONS

* RECOMMENDATION 70. In keeping with the spirit of planning for the future, the Study Team recommends that a Futures Study Group be appointed, voluntary in nature and open to all Library staff. The group will be advisory to the University Librarian and is given the task of scanning the environment and compiling on a regular basis a report of trends important in library planning. The group will be responsible for monitoring trends useful in writing a Library Plan for the 90's and helpful in revising the Plan for the 80's. The Group should utilize the Task Force Report from The Role of the Library in the Future as its starting point.

The Futures Study Group will allow a forum for intellectual stimulation and the growth of creative ideas that can be applied to the practical work environment. This is an important facet in a research library. The Group may hold discussions with faculty on their current and future research, an area holding some promise for future grant applications. The Group represents another way of helping the Library to carry out its mission to the university as a whole.

On a semi-annual basis, the Group will publish a brief newsletter to be disseminated to Library staff and possibly to faculty and appropriate outside groups. The newsletter will focus on trends in the library field, as well as those which affect the field. The Study Group will also report to the staff through the University Librarian's staff meetings. It will report and lead discussion on issues in a Management Workshop. Occasionally a member of the Group should address the Friends of the Library. (Source: Study Team; Role of the Library in the Future, p. 24)

RESPONSIBILITY: University Librarian
IMPLEMENTATION: Appointed by Fall, 1984

RECOMMENDATION 71. The Study Team recommends that the Public Services Advisory Committee, working in conjunction with the AUL, devise a mechanism for continually monitoring services to ensure that priorities are met. We recommend that the AUL continue to coordinate all major surveys to ensure validity, compatability, and comparability of similar Library Surveys. We recommend that every three years, a short survey be placed in the registration packet going to seniors to find out what use has been made of the Library. (Source: Study Team; Service Performance and Service Needs, p. 7)

RESPONSIBILITY: AUL/Public Services Advisory Committee
IMPLEMENTATION: On-going

RECOMMENDATION 72. There were very few responses to the user survey from the offsite, affiliated UCR personnel. Since most of these are CNAS affiliated,

the Study Team supports the Service Performance and Service Needs recommendation that the Head of the Sciences Libraries do a more indepth study of the information needs of this group and present her findings to the University Librarian as a separate study. (Source: Service Performance and Service Needs, p. 8)

RESPONSIBILITY: Head, Sciences Libraries Division
IMPLEMENTATION: Begin January, 1985

RECOMMENDATION 73. The Study Team recommends that librarians conduct and use research regarding the ways that specialists work in various subject disciplines in order to purchase and catalog appropriate resources and to provide instruction in their uses. Two ways in which this can be done is through LAUC-sponsored seminars in which faculty are invited to describe their research interests and through librarian-conducted study of how researchers gather their information in various subject areas. (Source: Role of the Library in the Future, p. 26)

RESPONSIBILITY: LAUC-R
IMPLEMENTATION: Fall Quarter, 1984

RECOMMENDATION 74. The Study Team recommends that each department head review and share with the department the comments from the User Surveys as a way of gathering useful comments about services and as a basis for improving services. It is especially important for stack maintenance staff to be aware of faculty and student comments regarding problem areas in order to take these comments into consideration for future shifts. (Source: Study Team; Service Performance and Service Needs, p. 5, p. 35)

RESPONSIBILITY: Department Heads
IMPLEMENTATION: Discretion of Department Head

* RECOMMENDATION 75. The Study Team recommends that the task force/group process approach to studying Library issues and problems continue to be utilized as a mechanism for current and future planning. There needs to be broad staff participation. The study revealed many hidden talents from individuals who had never had an opportunity to participate in a committee or task force before. We further recommend that further training, preferably from trainers at OMS, be provided to staff in group process, problem-solving techniques, and conflict management. It is felt that a training experience of this nature would be especially meaningful to study participants now that they have gone through the process.

RESPONSIBILITY: University Librarian
IMPLEMENTATION: Immediate and on-going

TABLE A

Responsibilities and Time Frames

This table is alphabetically organized by the title of the individual or group responsible for the recommendations. The numbers listed refer to the recommendation number. Recommendations are listed in order of implementation dates.

Associate University Librarian

71	Ongoing
43	June 30, 1984
21	Ordered June 30, 1984
2	July 1, 1984
67	July, 1984
21	In place by Fall Quarter, 1984
32	Fall Quarter
64	In place by next IEALC Annual Meeting

Bibliographers

60	1984/85 Academic Year

Budget and Personnel Officer

63	May 1, 1984
43	June 30, 1984
67	July, 1984
27	October 1, 1984
24	January, 1985
22c	With publication of next Campus Course List

Circulation Advisory Group

7b	Fall Quarter, 1984
42	Fall Quarter, 1984

Circulation Staffs

35	Summer, 1984

Circulation Task Force

7a	Spring Quarter, 1984

Collections Division Head

29 Fall Quarter
61 1984/85 Academic Year
30 Next academic appointment

Computer Planning Committee

2e Ongoing
2a October 1, 1984
2b November 1, 1984
2c Discretion of Committee
2d Discretion of Committee

Computerized Literature Search Services Coordinators

54 Immediately
45 May 1, 1984
46 July 1, 1984
48 July 1, 1984
47 September 1, 1984
50 Fall, 1984
49 Fall, 1984

Department Heads

18 Ongoing
31 June 1, 1984
42 June 30, 1984
26b September 30, 1984
39 Fall Quarter, 1984
74 Discretion of Department Heads
30 Next academic appointment

Division Heads

10c Immediate and ongoing
18 Ongoing
6 April 15, 1984
14 April 15, 1984
3 June 1, 1984
31 June 1, 1984
55 July 1, 1984 to assign responsibility
7 September 1, 1984
25 Discussion in Fall, 1984
29 Fall Quarter, 1984
38 Fall Quarter, 1984
17 October, 1984
64 October 1, 1984
28 November, 1984

Division Heads (continued)

67 Division Heads Group finialize standards after appropriate discussion and consultation
30 Begin with next academic appointment
10d June 30, 1985

Government Publications Department Head

62 December 1, 1984

IMRC/MSC Director

36 January, 1985

LAUC-R

73 Fall Quarter, 1984

Library Instruction Coordinators

53 Immediately
38 Ongoing
33 Fall, 1984
34 Fall, 1984
36 Fall, 1984
37 January, 1985
35 Spring, 1985

Public Services Advisory Group

71 Ongoing
6a June 1, 1984
14a September 15, 1984
33a Fall Quarter, 1984
6b Fall Quarter, 1984
6c Begin Fall Quarter, 1984
20a Fall Quarter, 1984
40 Fall Quarter, 1984
41 Fall Quarter, 1984
44 Fall Quarter, 1984
39 January, 1985
6c Draft to Division Heads Group by January 1, 1985
6e Planning to begin January, 1985
6f January 1, 1985 committee submits standards to division heads for discussion
6d In conjunction with designing a general training program & producing the Resource Manual
23 In conjunction with other training guidelines
22a With publication of next Campus Course List
14b When LAN is in place

Public Services Division Head

58 Fall Quarter, 1984
17 October, 1984
43 Fall Quarter, 1984
24a January 1985 begin exploring

Publications Coordinator

43 June 30, 1985

Sciences Bibliographer

61 1984/85 Academic Year

Sciences Division Head

10a July 1, 1984
43 Fall Quarter, 1984
24a Begin exploring January, 1985
72 Begin January, 1985

Selectors

59 1984/85 Academic Year
60 1984/85 Academic Year

Signs Coordinator

19 May 1, 1984

Social Sciences Bibliographer

59 June 15, 1984

Supervisors

22b During annual evaluations
26b During annual evaluations

Systems (CLSI, OCLC, MELVYL, INNOVACQ) Coordinators

41 Fall Quarter, 1984

Task Force on New Technologies

11a April 1, 1985

Task Force on Space

66 Immediately

University Librarian

30a Immediate & ongoing
52 Immediately
68 Immediately upon feasibility
75 Immediate & ongoing
16 Ongoing
15 Spring, 1984
4 May 1, 1984
11 June 1, 1984
5 June 15, 1984
1 July, 1984
9 July 1, 1984
51 July 1, 1984
56 Summer, 1984
20 September 1, 1984
7 September 1, 1984
69 Fall, 1984 & ongoing
8 Fall Quarter, 1984
70 Fall Quarter, 1984
?? Fall Quarter, 1984
50 Fall Quarter, 1984
17 October, 1984
65 October 1, 1984
57 December, 1984
11 January 1, 1985
12 January 1, 1985
11 April 1, 1985
13b June, 1985
13c June, 1985
13 Appropriate management workshop
13a Appropriate management workshop

University Librarians Advisory Group (formerly ULC)

4a Discuss at ULAG Meeting, Spring 1984

TABLE B

Committees and Task Forces Listed in the Report

Committees

These are Standing Committees, intended to play a generally permanent role in Library planning.

Circulation Advisory Committee (reconstituted; replaces Circulation Task Force)
Computer Planning Committee (reconstituted)
Futures Study Group (new)
Public Services Advisory Committee (reconstituted; replaces Public Services Discussion Group)
University Librarian's Advisory Group (formerly ULC)

Task Forces

These Task Forces, recommended by the Study Team, are intended to play a temporary role by covering a specific issue or issues over a fixed period of time.

Task Force on New Technologies
Task Force on Space
Task Force to Study Education Services, Government Publications, and the Music Library

PUBLIC SERVICES STUDY REPORT

ONE OF A SERIES
of Self-Studies
and Research Projects
funded by the General
Electric Foundation
and administered by the
Office of Management Studies,
Association of Research
Libraries

OMS

IP0570170

OFFICE OF MANAGEMENT STUDIES

ASSOCIATION OF RESEARCH LIBRARIES 1527 New Hampshire Avenue, N.W., Washington, D.C. 20036 • (202) 232-8656

EXPLANATORY NOTES ON THIS PUBLICATION SERIES

Final reports from self-studies and research projects of the Public Services Study sponsored by the General Electric Foundation and administered by the Office of Management Studies, Association of Research Libraries, will be made available within this publication series as they are issued in 1984-85.

This report was issued by the University of California, Riverside Library at the conclusion of its Public Services Study. Included with their report are some initial accompanying materials prepared by the Office of Management Studies staff -- a short description of the Public Services Study and an Executive Summary.

The Report of the Study Team which principally details recommendations is included here. Task force and interim reports, as listed on the Table of Contents, will be photocopied upon demand, for the prices indicated below.

Description and Inventory of Services	59	$15.00
Library Profile - UCR	56	$15.00
PROFILE: University of California, Riverside	110	$20.00
Task Force on The Role of the Library in the Future	96	$20.00
Task Force on Articulating the Library's PSS	166	$25.00
Report of the Service Performance & Service Needs Task Force	93	$20.00
Report of the Task Force on Technology & Public Service	104	$20.00
Report of the Task Force on Organization, Staffing & Management	135	$25.00

Additional copies of this report are available for $15.00. All items may be ordered from the Office of Management Studies, Association of Research Libraries, 1527 New Hampshire Ave., N.W., Washington, D.C. 20036. Prepayment is required. Outside the U.S. and Canada, add $5.00 per order for postage and handling.

MKS/OMS
June 1984

OFFICE OF MANAGEMENT STUDIES

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THE PUBLIC SERVICES STUDY

Academic libraries today face the fundamental challenge of responding more effectively to the information needs of their users in a period of increased information resources and decreased or stabilized economic resources. In this environment, academic libraries must move toward the wisest use of their resources in identifying and serving the changing needs of users, in becoming more active partners in the instructional and research interests of their universities, and in more actively facilitating the transfer of information from locations beyond their walls to their own clientele. The challenge includes the need to take advantage of new and emerging capabilities such as on-line bibliographic search services, new catalog formats, and microform and non-print publishing media.

To address this set of concerns, the Office of Management Studies has developed the Academic Library Public Services Study, which individual academic libraries can use to assess and improve their current services programs. The study is based upon the premise that academic libraries are experiencing a number of fundamental internal and external pressures that create a need to review priorities and develop new approaches to change. Although there has been a large emphasis on collections and collection-maintenance activities in academic libraries, there has been a lack of study in the area of public services. The Public Services Study attempts to fill this gap, and aims at improving library performance and responsiveness to university needs and expectations. The goals of this study include:

*to provide tools to libraries enabling them to determine and analyze user patterns, needs, and satisfaction levels;

*to provide assistance to libraries in relating the use of the library to current operating services policies and practices;

*to design performance measures that can be applied in evaluating current services programs and in planning improvements;

*to provide guidelines for libraries to use in designing new services activities or remodeling current ones;

*to suggest improved methods for promoting the use of library services and enhancing the role of the library on the campus.

The basic strategy employed in the Public Services Study is assisted self-study. While assisted self-study resembles traditional self-studies in some respects, it differs on three important dimensions. First, assisted self-study involves collecting information and then later analyzing it within a framework as first steps toward improvement. Second, assisted self-study promotes the learning and development of all persons involved through their experiences in conducting the study. This means that the staff develops a broader understanding of the impact of services concerns on the ability of the library to meet its obligation to users. And third, libraries participating in assisted self-study receive specialized resource materials, training, and consultation assistance usually not provided in traditional studies. This ensures timely efficient execution of what can be a demanding complex activity.

In accordance with its problem-solving philosophy, assisted self-study employs a group approach to analysis, using library staff, faculty, students, and institutional officials. Two types of groups are involved, a study team and task forces. Primary responsibility rests with the study team, which defines the scope of the study, sets goals, plans, organizes and conducts analyses, draws final conclusions, and designs the implementation program. The study team also creates the task forces to assist in collecting and analyzing data and in developing options for resolving problems. The task forces are responsible to the study team and their work is coordinated by the team.

The major components of the study are a general situational analysis, and specific modules on description and inventory of services, management of services, assessment of services needs and performance, and interaction with the environment. Data gathering and analysis is conducted within each of these components. Then, a final action planning stage creates recommendations, implementation strategy, and the final report. The entire study takes 9 to 12 months. Individual modules can be conducted to less time, for less cost.

The study is being made available as a part of the Academic Library Program, which is used by libraries willing to commit staff time and some financial resources to the process of assisted self-study. The program draws upon several previous studies developed and operated by the Office of Management Studies including the Management Review and Analysis Program (MRAP), the Collection Analysis Project (CAP), the Academic Library Development Program (ALDP), the Planning Program for Small Academic Libraries, and the Preservation Planning Program.

Financial and/or design support is coming chiefly from members of the Association of Research Libraries (ARL), a non-profit educational organization of 117 major research libraries in the United States and Canada. Its membership includes 101 large university libraries, the national libraries of the U.S. nd Canada, several private and special libraries, and a few very large state and public libraries.

PREPARED BY OMS STAFF

OFFICE OF MANAGEMENT STUDIES

ASSOCIATION OF RESEARCH LIBRARIES 1527 New Hampshire Avenue, N.W., Washington, D.C. 20036 • (202) 232-8656

EXECUTIVE SUMMARY
of the
PUBLIC SERVICES IN RESEARCH LIBRARIES PROJECT
Report of the Study Team
University of California, Riverside

Thirty-five staff members of the University Libraries participated in this 11-month long Public Services Self-Study. Five task forces assisted the Study Team, and 75 recommendations for action, with schedules for implementation, resulted from the work. The task force on Service Performance and Service Needs carried out user surveys of 1,000 faculty, graduate and undergraduate students, and external users.

Recommendations are presented within broad administrative areas: organization and administration, policy, communications, staff and staffing, services, facilities, and ancillary, which includes a Futures Study Group, research on information needs of scholars, and mechanisms for ongoing planning.

Themes identified throughout the recommendations include commitment to coordinated public services training and the necessity of organizing and planning for technological change. The number and content of issues in the recommendations gives an idea of the enormity and complexity of the study. Because of the naturally dependent relationship of public services and technical services, many of the recommendations stray beyond a pure public service approach. The Study Team reports that the library as a whole, its users, and the campus will benefit from the work.

Task forces and their charges were:

The Role of the Library in the Future in its Commitment to Public Services. Addressed questions of quality-quantity, self-service vs. full-service, the role of the library as a broker of information vs. knowledge institution, and the importance of a national public information policy.

Service Performance and Service Needs. Studied the current service performance of the library and determined future needs.

Technology and Public Services. Explored the more specific and concrete aspects of the application of technology to public services. Included an inventory of technology presently in use in public services and recommended mechanisms for future planning and coordination of technology in the library.

Organization, Staffing, and Management of Public Services. Examined organizational structure and reporting mechanisms in public services. Studied staff perceptions of their roles and priorities for service.

Articulating the Library's Public Services Program. Studied the public image of the library as presented through its staff, its publications, its facilities, and its formal programs.

The report includes a summary and an introduction that describes environmental trends affecting the current and future provision of services at UCR. The major part of the document consists of a listing of the recommendations, together with the rationale for each. Task Force reports are available as separate publications.

Prepared by OMS Staff

June 1984